CHILTON'S

JULY 1980

CCJ

COMMERCIAL CARRIER JOURNAL

TOP 100

INDUSTRY STATISTICS
PRIVATE FLEETS

CHILTON'S
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COMMERCIAL CARRIER JOURNAL

VOLUME 146 NUMBER 7 JULY 1989

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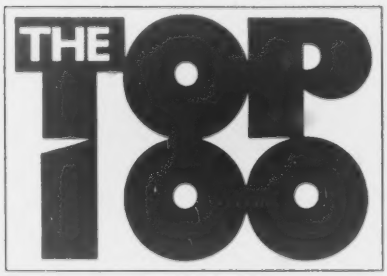

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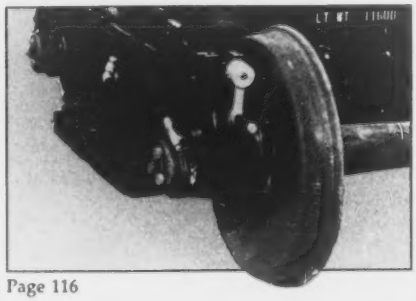

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HARD TIMES IN WISCONSIN!

Believe it or not.

As a cost cutting measure, all preventive maintenance was eliminated for two decades at the municipal fleet of Madison, Wisc. The fallacy in that logic was reiterated throughout the 20-year period in uncontrollable maintenance costs and unscheduled downtime.

That's the legacy – and the challenge – city officials presented when they hired motor equipment manager Chris Roach to turn the fleet around.

And that's what he did.

In CCJ's August issue, Roach tells how he used Statistical Process Controls to turn the City of Madison's fleet into a model for maintenance management. This is Part III in CCJ's on-going series on quality improvement techniques in trucking management. □

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Study: Brokers a boon to small fleets, shippers

By PARRY DESMOND Executive Editor 215-964-4529

The role of freight brokers licensed by the Interstate Commerce Commission was recently studied by Dr. Terence A. Brown, associate professor of transportation and marketing at Penn State University's School of Business Administration on the Harrisburg campus. The research determined that:

- Assuming that Class 1 and 2 carriers had $40 billion in total revenues in 1987 and brokers' total sales for the same year were $5.89 billion, then brokers attracted about 15% of the trucking industry's total revenues.
- Brokers typically have small businesses—75% have only one office and $700,000 annual gross sales. Although the estimated 4,250 active brokerages employ an average of 5.54 workers, for a total industry employment of 23,567, half of the survey respondents employ three or less workers.
- 60% of the respondents reported they were independently owned and operated, and 31% said they were a department or a subsidiary of a trucking company.
- Members of the Transportation Brokers Conference of America handled more LTL shipments, used more carriers and had higher sales than non-TBCA members.
- On average, brokers served 95 shippers in 1987. Typically, shippers were manufacturers that employed less than 100 people and had 20 or fewer outbound shipments a week.
- 63% of the respondents reported steady-to-rapid shipment volume growth in the past three years, and 76% project growth.
- The typical broker used an average of 179 carriers in 1987, but more than half of the respondents use 50 or less. And "brokers are more important to small (21 or fewer trucks), new, 'heavy user' carriers than to larger, older carriers." Carriers defined as "heavy users" generated more than 33% of their total business from brokers.
- 93% of the respondents said the shipper pays the broker, who, in turn, pays the motor carrier.
- Nationwide, brokers handled approximately 10.8 million truckload shipments in 1987, with an average of 2,480 loads per broker. About 60% of the brokers handled a total of 2.8 million shipments of less-than-truckload freight, averaging 1,048 shipments per broker.

The brokers claimed providing backhaul freight and reducing empty mileage were the most important benefits they provided.

Regulation started in 1935

Freight brokers were first regulated as part of the 1935 Motor Carrier Act. In the ensuing years, the ICC established a $5,000 surety bond requirement for brokers. By 1939, licenses were granted to 51 applicants, and 71 were denied. The most common reason for denying a license, according to Brown, was lack of showing a good need for the service.

By the mid-1970s, according to ICC records, there were only 70 licensed brokers, and many of those were inactive.

In the late 1970s, the ICC decided to open entry to the brokerage industry. As a result, 144 of 152 applications were approved. At the same time, surety bonds were raised to $10,000.

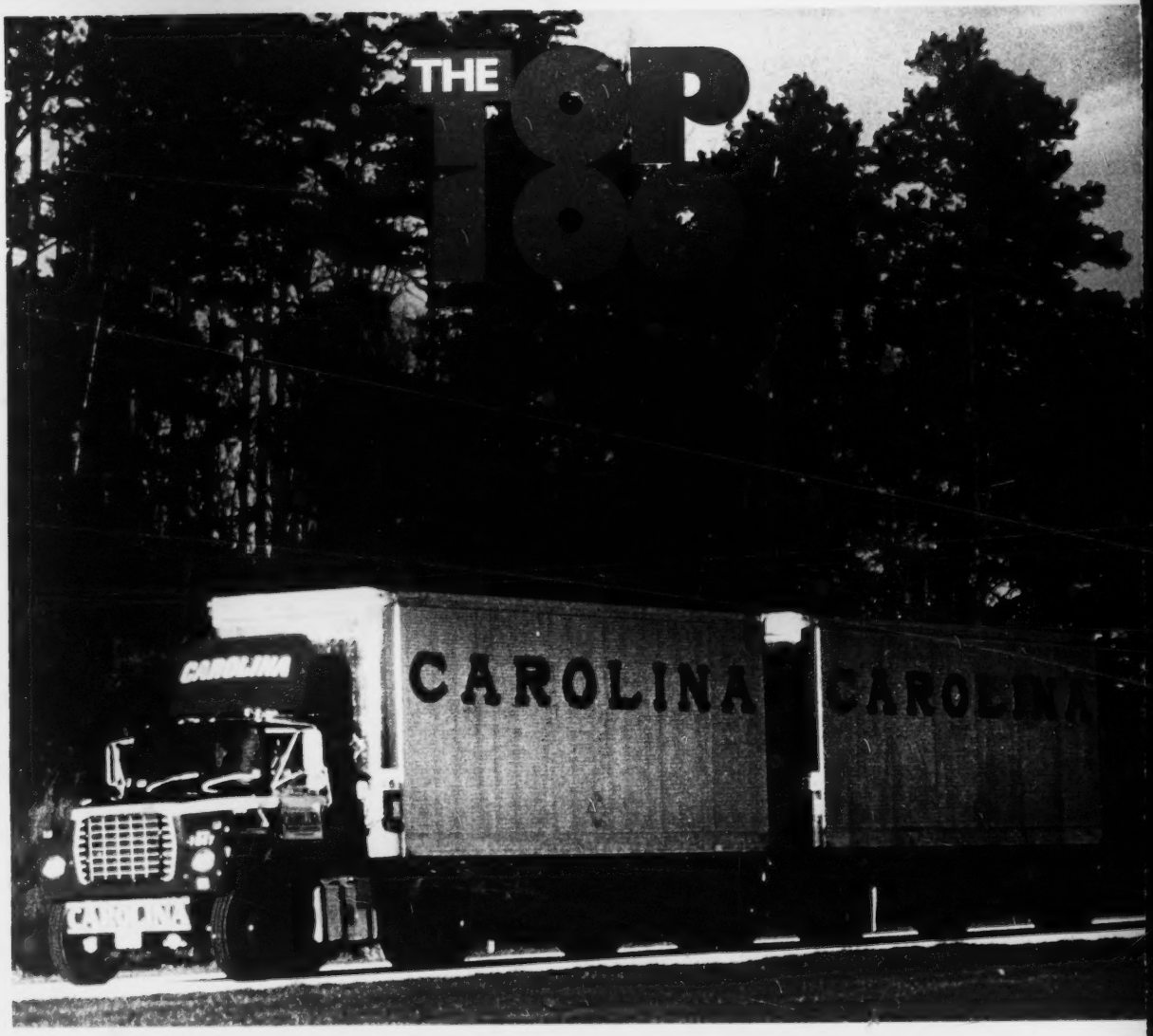
Since deregulation of the trucking industry in this decade, growth of brokers has boomed. In 1988, there were 5,900 licensed brokers; 59% of the brokerages were started since 1985.

The research project, conducted under contract with the U.S. Small Business Administration, included a survey of 1,477 brokerages—548 responding—and interviews with 60 brokers, motor carriers and shippers. □

States with Most Brokers

State	No. of Brokers
California	455
New Jersey	380
Texas	365
Illinois	360
Ohio	311
Pennsylvania	282
New York	256
Georgia	205
Missourri	191
Minnesota	184

These 10 states have a total of 2,989 broker headquarters and account for almost 51% of all brokerages, according to the study done by Dr. Terence Brown of Penn State University. Although most of the brokers are based near or are in association with manufacturing activity, New Jersey and Texas have disproportionately more brokers, perhaps because of port activity in those states.



1988: BIGGER, BETTER, BUT NO BOOMER

Gross revenues up 8.5% and a 94.8 OR. Those aggregate figures illustrate why 1988 was a good year for most of the nation's Top 100 for-hire fleets. And the four largest carriers continue to capture an increasing share of traffic, snaring 47.7% of 1988's Top 100 revenues.

By PARRY DESMOND, *Executive Editor*

Without question, 1988 was a bigger, better year for most of the nation's major for-hire fleets. That is the obvious conclusion when analyzing data accessed from carrier reports filed with the Interstate Commerce Commission.

The Top 100 enjoyed $30.5 billion in gross sales last year. That's 8.5% better than the leading common carriers' 1987 gross revenues. Total expenses for the Top 100

Text continues on page 77

Less-Than-Truckload Common Carriers of General Freight

Fleet Name, City, State	Gross Revenues	Total Operating Expenses	Net Operating Income	Operating Ratio	Interest Expense	Other Income Adjustments	Income/ Deferred Taxes	Net Income
AAA COOPER TRANSPORTATION, DOTHAN, AL	$ 116472	$ 102330	$ 14142	87 9	$ 1709	$ 6	$ 113	$ 12326
ABF FREIGHT SYSTEM INC, FORT SMITH, AR	616774	590759	26015	95 8	9000	(8051)	52	8912
A-P-A TRANSPORT CORP, NORTH BERGEN, NJ	129151	120787	8364	93 5	1673	261	760	6192
ADVANCE TRANSPORTATION CO., MILWAUKEE, WI	94977	92234	2743	97 1	1816	(48)	172	707
ANR FREIGHT SYSTEM, INC., DENVER, CO	468009	475105	(7096)	101 5	2689	(1661)	(5169)	(6277)
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	2982
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	3484
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	12949
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	11015
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	9892
CHURCHILL TRUCK LINES, CHILLICOTHE, MO	139548	133290	6257	95 5	298	437	2590	3806
CON-WAY WESTERN EXPRESS, INC., PORTLAND, OR	88799	77143	11656	86 9	563	(7)	4082	7004
CONSOLIDATED FREIGHTWAYS, PORTLAND, OR	1749180	1643352	105828	93 9	7283	9490	33851	74184
ESTES EXPRESS LINES, RICHMOND, VA	88446	74618	13829	84 4	154	733	5307	9101
G.I. TRUCKING COMPANY, LA MIRADA, CA	75001	77602	(2601)	103 5	1887	(1)	(1522)	(2967)
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	294
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	(3387)
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	(512)
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	353
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	16095
NORTHWEST TRPT SERVICE, COMMERCE CITY, CO	172333	158554	13779	92 0	27	701	5383	9070
OLD DOMINION FREIGHT LINES, HIGH POINT, NC	114786	109472	5314	95 4	4333	691	663	1009
OVERNITE TRANSPORTATION CO., RICHMOND, VA	638486	555881	82605	87 1	821	9682	33717	57749
P*I*E* NATIONWIDE, JACKSONVILLE, FL	500344	506520	(6176)	101 2	11014	31976	4529	10257
PRESTON TRUCKING CO., INC., PRESTON, MD	368044	357405	10639	97 1	4929	1152	2621	4241
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	74718
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	5573
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1960
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	8802
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	(5327)
ST. JOHNSBURY TRUCKING CO., HOLLISTON, MA	296900	268650	28250	90 5	3422	(10383)	9291	5154
TNT HOLLAND MOTOR EXPRESS, HOLLAND, MI	181953	162983	18969	89 6	16	30	7292	11691
TNT RED STAR EXPRESS LINES, AUBURN, NY	127420	122485	4935	96 1	315	207	1935	2892
TRANSCON LINES, LOS ANGELES, CA	266061	288848	(22787)	108 6	2213	(2145)	34	(27179)
TRANSUS, INC., ATLANTA, GA	68787	68188	599	99 1	127	(856)	—	(384)
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	373581
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	22721
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	(3297)
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	2056
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1941
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	66419
TOTAL—LTL GENERAL FREIGHT	$21553011	$20462839	$1090171	94 9	$95009	$58042	$263404	$789800

[1]Average based on only those carriers reporting applicable data.

(all dollar amounts in thousands)

Net Profit Margin, %	Salaries-Officers/ Supervisors	Salaries & Wages	Fringes	Maintenance/ Operating Supply/Exp.	General Supplies & Expenses	Operating Taxes & Licenses	Insurance	Communi-cation & Utilities	Depreciation & Asset Disposition	Equipment Rents/Purch. Transportation	Tons Carried (000)
10.58%	$ 14525	$ 41042	$ 8379	$ 8950	$ 5596	$ 3550	$ 3384	$ 2103	$ 7511	$ 7290	899
1.44	65641	250307	91687	45983	50791	23623	12594	10216	28858	11058	2698
4.79	12210	50070	19073	9810	13130	2518	4115	3202	6028	632	718
0.74	7667	36081	15151	7857	4761	3130	3394	1406	2066	10720	833
(1.34)	38186	189137	75839	44745	38955	14721	12555	7962	1941	51065	3187
4.08	6151	16604	4311	6214	1745	1284	1530	1547	2558	7231	586
3.99	8115	25024	7331	4911	4668	1618	1404	1603	5914	8161	1073
2.44	50829	171511	31411	24930	21700	6541	10281	9676	26599	35488	2529
5.21	16963	44110	12316	17431	8907	6451	4417	1861	11467	1613	2421
3.19	13861	42450	11038	7441	10614	2734	4280	1479	4138	20470	4146
2.73	12882	51323	17559	14897	6033	4628	2544	2140	5908	15375	824
7.89	11456	29512	9410	6254	6917	2814	3290	1623	4652	1214	547
4.24	181166	662345	265809	181263	92930	55479	51597	23074	80022	79769	6521
10.29	8607	35769	7260	7290	3105	3237	2598	1431	4855	465	906
(3.96)	7190	25643	7150	5921	5123	2105	3473	1641	4159	15200	407
0.35	6535	19454	10134	5044	21543	2136	1702	1436	1522	8636	599
(4.70)	5990	33545	11435	4001	2744	2274	1611	1329	4712	2009	1329
(0.71)	6382	24164	4297	4824	3606	1942	1317	1447	1310	17971	514
(0.40)	6695	35670	7855	7116	3334	2661	2615	225	7163	967	
14.69	9404	47607	15617	5184	3954	1552	2431	1469	4999	787	717
5.26	17870	60333	22362	12497	19987	6347	3080	1533	350	14195	818
0.88	11842	30380	7045	10503	6793	3529	6317	2261	4549	26254	988
9.04	54104	260333	56577	68505	24580	27899	17077	12497	19947	14363	4421
2.05	51046	201843	96248	39784	34488	18015	13102	9267	21524	21203	1869
1.15	26676	163161	58946	32316	16569	10865	8724	5929	14689	19529	2498
4.41	19974	64037	29113	14220	14023	5214	5641	2816	10266	48694	6460
7.28	1886	4258	1016	1861	6654	503	2129	1921	352	48993	167
2.67	5080	23591	6409	6211	3411	1176	1681	1360	5666	8217	758
7.34	4611	16629	11729	11266	4586	904	2053	2074	5566	2714	1228
(7.75)	11112	16551	5333	8625	5533	1468	2508	1970	4393	19002	671
1.74	20499	128396	46177	22315	14995	6994	6138	4949	6503	11683	1889
6.43	14852	73667	25138	16825	6257	5968	3455	2139	5351	9331	1593
2.27	13686	53888	22934	10670	6575	3518	2330	2589	4142	2154	670
(10.22)	29213	101417	48985	25437	30176	10286	8732	5455	6615	22532	1100
(0.56)	6572	23222	5114	6505	3806	1774	2996	1737	1900	14562	799
5.65	81690	274150	96888	41210	42922	9336	11292	9530	19277	325665	13302
0.90	33719	108544	44074	16922	14944	6831	5499	4129	6557	130885	
(1.61)	23135	67975	22643	13466	18365	8176	6805	4487	11215	13173	1287
1.20	18356	66120	10087	9984	16268	4089	6258	3509	2873	57117	646
2.57	6151	30896	11702	8007	3608	3124	1475	904	4241	925	563
3.33	18764	80845	32873	17691	13445	6793	4881	3026	10834	37218	7770
3.66%	$2351575	$8519903	$3117824	$1596420	$1407037	$518287	$482450	$337508	$796877	$1334955	81918

Vehicle Mileage (000)	Vehicle Mileage (000)				Average Haul (In Miles)	Line Haul Cost/ Mile	Tons Carried		Shipments Carried		Average Load (In Tons)
	Owned Vehicles	Leased Vehicles w/Driver	Leased Vehicles w/o Driver	Intermodal			LTL (000)	TL (000)	LTL (000)	TL (000)	
33332	31352			1981	800	$0.84	691	207	1605	21	8.1
212516	209852	6		2658	1185	1.01	1980	718	4146	79	15.0
13044	13044				248	1.51	572	146	1674	13	13.6
22006	5265	305	16436		255	1.24	531	302	1045	27	9.6
155422	109883	21167	7530	16842	563	1.11	2017	1169	4695	100	11.5
21992	19783	2209				N.A.	431	84	424	19	8.2
43834	13141	4693	6038			N.A.	482	93	952	46	N.A.
160878	133379	1891		25608		—	95	57	4487	62	11.8
60791	54406			6385		—	53	14	6171	85	8.9
96724		3500	84000	9224		N.A.	5400	961	4284	139	8.0
43468	35714	4996		2758	800	1.05	603	221	1145	24	11.3
18444	17979	372	94		609	N.A.	429	121	1124	13	9.2
557344	508941	11877	1010	35516	1391	N.A.	4944	1587	12163	173	16.1
20479	20479				193	0.98	565	342	1195	30	8.5
11645	5671	5075	899		284	N.A.	145	62	892	9	9.9
25457	14609	1131	7717	3000	800	N.A.	1161	1	846	18	10.2
27680	22431	2	3249		1241	N.A.	24	49	4851	82	7.0
16185	16185				702	N.A.	149	113	1694	15	9.4
25303		2000				N.A.	421	1	2115	29	12.8
16878	16878					N.A.	71	28	1751	19	9.5
58808		1490	56027	1291	1249	1.07	506	312	1084	29	17.3
44669	29113	15270	286		368	0.95	529	459	1002	60	8.1
240535	235184			5350	629	0.82	2838	1584	6307	144	11.5
161622	144330			17292	1286	1.23	1492	417	3492	50	14.9
89909	75914	3412		10582	591	1.16	1662	837	3546	90	10.4
506248	461438	700		44110	1100	1.28	4400	1468	11638	165	15.5
66021	64614	1407			N.A.	N.A.	1600		N.A.	N.A.	N.A.
19909	19909				512	N.A.	410	464	899	26	9.7
40460	40460				1100	N.A.	1100	454	1727	40	7.1
23735	8365	15370				N.A.	410	251	692	25	10.6
58737	58737				301	1.02	1349	540	3241	49	9.7
53880	53880				238	0.92	1173	420	2043	47	7.1
16302	16181	121			200	1.36	575	95	1528	12	8.2
97211	94124	1580		1508	1403	N.A.	790	310	2016	46	15.9
25273	12216	8874	15	4168	359	0.83	364	435	835	32	9.9
1616001	1592408	23593		N.A.	N.A.	N.A.	31960		242863	—	N.A.
62459	62459				542	1.05	704	563	2068	53	11.2
84174	31843	52331			2436	N.A.	475	171	912	20	11.9
17900	17614	274	12		444	N.A.	368	196	709	19	14.0
640097	609411	12		30674	1115	1.00	6800	1468	14955	190	14.7
5507374	4818751	241946	246073	200608	565	$1.04	60680	21240	2530230	2100	11.01

Other Trucking Segments

(all dollar amounts in thousands)

Fleet Name, City, State	Gross Revenues	Total Operating Expenses	Net Operating Income	Operating Ratio	Interest Expense	Other Income Adjustments	Income/ Deferred Taxes	Net Income	Net Profit Margin, %
TRUCKLOAD GENERAL FREIGHT									
BUILDERS TRANSPORT, CAMDEN, SC	$ 203861	$ 195780	$ 8081	96.0	$ 8764	$ (4)	$ (196)	$ (491)	(0.24)%
COUNTRY WIDE TRUCK SERVICE, POMONA, CA	87834	87423	411	99.5	2559	431	(201)	(1516)	(1.73)
CRETE CARRIERS CORP., LINCOLN, NE	95939	91261	4678	95.1	90	1711	(286)	6585	6.86
DART TRANSIT CO., ST. PAUL, MN	85141	79614	5527	93.5	1902	1476	53	5048	5.93
GEMINI TRPTN. SERVICES, GREENSBURG, PA	89044	86609	2435	97.3	90	(1070)	887	388	0.44
J.B. HUNT TRANSPORT INC., LOWELL, AR	392553	332808	59745	84.8	6500	—	20200	33045	8.42
JONES MOTOR COMPANY, SPRING CITY, PA	68554	67465	1090	98.4	1	568		1657	2.42
M.S. CARRIERS, INC., MEMPHIS, TN	68480	57801	10679	84.4	773	545	4012	6439	9.40
MERCER TRANSPORTATION CO., LOUISVILLE, KY	73388	68919	4469	93.9	20	—	39	4410	6.01
MISSOURI-NEBRASKA EXP., ST. JOSEPH, MO	85230	81281	3949	95.4	2375	1135	1241	1469	1.72
MUNSON TRANSPORTATION, MONMOUTH, IL	82933	75564	7369	91.1	3763	127	371	3362	4.05
P.A.M. TRPTN. SERVICES, TONTITOWN, AR	75796	73746	2049	97.3	3440	111	34	(1314)	(1.73)
PENNSYLVANIA TRUCK LINES, WYNNEWOOD, PA	88920	86887	2033	97.7	421	1502	2201	913	1.03
PRE-FAB TRANSIT, FARMER CITY, IL	72181	70000	2181	97.0	258	466	622	1767	2.45
RANGER TRANSPORTATION, JACKSONVILLE, FL	209926	207074	2852	98.6		129	1549	1432	0.68
ROADRUNNER TRUCKING, ALBUQUERQUE, NM	74270	67621	6649	91.0	746	(1178)	1805	2920	3.93
RYDER DISTRIBUTION RESOURCES, MIAMI, FL	251755	246707	5048	98.0		(2053)	3951	(956)	(0.38)
RYDER FREIGHT SYSTEM, SALT LAKE CITY, UT	84894	89487	(4593)	105.4	180	(41924)	(6155)	(40542)	(47.76)
SCHNEIDER NATIONAL CARRIERS, GREEN BAY, WI	302919	295853	7066	97.7	1533	1497	2020	5010	1.65
SIGNAL DELIVERY SERVICE, DOWNERS GROVE, IL	248725	238164	10561	95.8	4733	(7)	4585	1236	0.50
UNIVERSAL AM-CAN, LTD., STERLING HTS., MI	78614	73299	5315	93.2	32	852	1957	4178	5.31
WERNER ENTERPRISES, OMAHA, NE	191438	163232	28206	85.3	2091	448	10492	16071	8.39
TOTAL—TRUCKLOAD GENERAL FREIGHT	$ [illegible]	$ [illegible]	$ [illegible]	[illegible]	$ [illegible]	$ [illegible]	$ [illegible]	$ [illegible]	1.70%
TANK TRUCK									
CHEMICAL LEAMAN TANK LINES, EXTON, PA	$ 214424	$ 208280	$ 6145	97.1	$ 5305	$ (1305)	$ 1757	$ (2222)	(1.04)%
DSI TRANSPORTERS, INC., DEER PARK, TX	69627	63651	5976	91.4	1450	30	1825	2731	3.92
FLEET TRANSPORT CO., INC., CLEVELAND, OH	72683	73767	(1084)	101.5	2158	527	—	(2715)	(3.74)
GROENDYKE TRANSPORT INC., ENID, OK	76357	71733	4624	93.9	1164	132	38	3554	4.65
KOCH SERVICE, INC., WICHITA, KS	91956	74140	17816	80.6	16	—	6699	11101	12.07
MATLACK, INC., WILMINGTON, DE	227695	220842	6852	97.0	5741	176	433	854	0.38
MILLER TRANSPORTERS, INC., JACKSON, MS	74048	71731	2316	96.9	1047	(47)	546	676	0.91
REFINERS TRPT. & TERMINAL, CLEVELAND, OH	69039	71371	(2332)	103.4	1774	115	—	(3991)	(5.78)
TOTAL—TANK TRUCK	$ [illegible]	$ [illegible]	$ [illegible]	[illegible]	$ [illegible]	$ [illegible]	$ [illegible]	$ [illegible]	1.11%
MOTOR VEHICLES									
ALLIED SYSTEMS "LTD.," DECATUR, GA	$ 200822	$ 194688	$ 6135	96.9	$ 1012	$ 779	$ —	$ 5902	2.94%
ANCHOR MOTOR FREIGHT, BIRMINGHAM, MI	272209	263367	8842	96.7	5652	310	4166	(666)	(0.24)
CASSENS TRANSPORT CO., EDWARDSVILLE, IL	81129	77724	3405	95.8	609	327	1033	2090	2.58
COMMERCIAL CARRIERS INC., SOUTHFIELD, MI	198043	183727	14316	92.8		1064	4212	11168	5.64
COMPLETE AUTO TRANSIT, BLOOMFIELD HILLS, MI	247180	232059	15121	93.9	1731	3541	2470	14461	5.85
CONVOY COMPANY, PORTLAND, OR	68636	68178	458	99.3	57	278	299	380	0.55
JACK COOPER TRPT. CO., OKLAHOMA CITY, OK	90788	88562	2226	97.6	1649	(330)	242	5	0.01
DALLAS & MAVIS FORWARDING, KENOSHA, WI	85350	80004	5346	93.7	62	122	2157	3249	3.81
E&L TRANSPORT COMPANY, DEARBORN, MI	104757	101537	3219	96.9	74	555	1300	2400	2.29
M&G CONVOY, INC., BUFFALO, NY	107455	105601	1854	98.3	1197	345	(1036)	2038	1.90
NU-CAR CARRIERS, INC., BIRMINGHAM, MI	145847	148146	(2299)	101.6	4113	6	(800)	(5606)	(3.84)
TOTAL—MOTOR VEHICLE CARRIERS	$ [illegible]	$ [illegible]	$ [illegible]	[illegible]	$ [illegible]	$ [illegible]	$ [illegible]	$ [illegible]	2.21%
REFRIGERATED COMMODITIES									
FFE TRPTN SVCS INC, DALLAS, TX	$ 88699	$ 84286	$ 4414	95.0	$ 445	$ 262	$ 1354	$ 2877	3.24%
KLLM TRANSPORT SERVICE, INC., JACKSON, MS	97410	89019	8391	91.4	3749	26	1725	2943	3.02
MIDWEST COAST TRANSPORT, SIOUX FALLS, SD	69174	67474	1701	97.5	77	116	546	1194	1.73
NATIONAL CARRIERS, INC., LIBERAL, KS	68118	66006	2111	96.9	2024	493	245	335	0.49
TOTAL—REFRIGERATED COMMODITIES	$ [illegible]	$ [illegible]	$ [illegible]	[illegible]	$ [illegible]	$ [illegible]	$ 3870	$ 7349	2.27%
OTHER SPECIALIZED									
ANDERSON TRUCKING SVC, ST CLOUD, MN	$ 83822	$ 78970	$ 4852	94.2	$ 705	$ (176)	$ 1288	$ 2683	3.20%
JACK GRAY TRANSPORT, INC., GARY, IN	76447	68983	7464	90.2	469	552	3086	4461	5.84
INDEPENDENT FREIGHTWAYS, ROCKFORD, IL	130802	129141	1661	98.7	246	—	815	600	0.46
MERCHANTS HOME DELIVERY, OXNARD, CA	78137	71809	6328	91.9	23	(130)	2905	3270	4.18
STOOPS EXPRESS, INC., ANDERSON, IN	104533	102995	1538	98.5	862	—	—	676	0.65
TRI-STATE MOTOR TRANSIT, JOPLIN, MO	93721	94179	(459)	100.5	1471	2444	174	340	0.36
TOTAL—OTHER SPECIALIZED	$ 567462	$ 546077	$ 21384	96.3	$ 3776	$ 2690	$ 8268	$12030	2.12%

Salaries-Officers/Supervisors	Salaries & Wages	Fringes	Maintenance/Operating Supply/Exp.	General Supplies & Expenses	Operating Taxes & Licenses	Insurance	Communication & Utilities	Depreciation & Asset Disposition	Equipment Rents/Purch. Transportation	Tons Carried (000)	Vehicle Mileage (000)
$12050	$ 62710	$ 13303	$ 39248	$ 11784	$ 19864	$ 10866	$ 4479	$ 19618	$ 1863	5966	200233
4953	14183	3298	16748	4619	3045	4912	1507	6585	27574	N/A	N/A
2398	1391	689	2166	1327	168	2065	814	1985	78257	N/A	N/A
1252	3320	886	5968	1809	1341	2107	1053	3203	58675	1426	80217
→	8680	462	1548	4258	39	3859	517	260	66986	N/A	N/A
16810	118595	27344	63916	6778	33770	16892	7804	40895	4	N/A	382743
3493	9028	4939	118	7018	1123	1892	543	109	39202	1263	45448
2465	15777	3445	13620	6730	2195	2791	1148	8172	1458	N/A	60601
2364	1166	844	194	3858	1206	3230	1066	143	54847	1241	65175
3044	26497	4092	23056	52	4081	2839	1292	7452	8877	616	88886
2339	22590	5949	19093	3367	7663	2963	1245	9589	764	1985	79964
→	29437	←	22885	1719	3411	3103	1397	9185	2609	N/A	82913
10345	32017	17417	12031	4025	1550	1933	700	2565	4306	N/A	13761
1833	8387	2154	8954	5196	2397	3361	1386	895	35438	1062	76527
591	13954	872	4849	22898	1997	7167	1169	1817	151760	N/A	N/A
→	17858	←	16275	1657	2606	2760	1045	4942	20478	N/A	N/A
11481	88969	27488	28430	19711	1055	9500	2464	2024	55585	2507	104237
3730	23208	6100	27276	3324	3114	4672	2030	555	15478	1072	96718
→	68651	←	57383	63747	15689	13454	W GS&E	508	76421	N/A	N/A
8601	99034	40338	25659	21852	11530	8526	1203	15680	5742	N/A	160544
3650	2565	758	544	6808	1502	2366	1234	2746	51125	1680	33927
→	68194	←	39675	1220	19834	8707	2667	20022	2913	N/A	192151
$91399	$736711	$160375	$4	$	$	$	$	$	$	N/A	N/A
$13355	$ 42459	$ 20123	$ 35339	$ 10683	$ 6682	$ 7437	$ 4317	$ 12299	$ 55586	6413	101594
4395	20888	5438	11540	6229	3622	2748	1240	5569	1981	3579	45555
2447	3491	2364	5404	10912	821	4014	1039	2383	40893	7507	52778
2897	21639	5262	9069	2971	3190	6447	786	2899	16572	4389	54735
3804	26306	5161	18412	6793	1925	4089	1337	5932	381	N/A	51082
12875	50561	19467	38674	12506	9168	6284	4924	14828	51554	8760	113711
4816	18248	6605	10874	4091	3326	2365	1357	3062	16988	3253	47716
1832	19416	9625	9085	10301	1115	3643	750	3088	12518	6214	36038
$46421	$208608	$ 74625	$	$	$	$	$	$	$	N/A	503209
$ 4571	$ 75495	$ 26597	$ 25476	$ 14572	$ 10321	$ 9989	$ 1452	$ 1385	$ 24830	7277	90957
8810	97820	40064	38657	31760	4077	16725	1818	22613	1026	3284	106010
2216	29851	10367	11068	2460	4969	3156	562	2795	10280	1060	42432
6944	65244	22961	25880	5688	9377	7676	1218	10627	28113	3455	86238
7465	72265	28991	32028	8079	10678	7614	1961	19606	43372	2698	112280
2419	24419	9549	9101	3426	3539	2363	713	2402	10247	810	28302
4893	35091	14674	16850	3058	4945	3802	775	4458	16	1256	44253
1736	21888	9839	8018	13588	3095	2792	955	778	17314	1196	53096
5069	31824	12468	14313	6092	5231	4061	897	2549	19033	1238	38681
4386	35969	13898	15134	3988	4648	5526	908	9607	11538	1381	41750
5481	52660	20059	23696	14384	2903	11022	972	8143	8826	3202	58140
$53990	$542526	$207431	$	$	$	$	$	$	$	27907	702139
$ 5371	$ 2251	$ 2407	$ 4526	$ 4326	$ 915	$ 2705	$ 1758	$ 1467	$ 58561	967	46469
4043	24832	3938	33600	4860	1684	5349	—	10713	—	1457	92195
2486	675	985	1346	1385	111	2222	638	2202	55425	806	72577
1838	1586	1161	2463	2568	491	2621	358	1341	51579	N/A	N/A
$13738	$ 29344	$ 9491	$	$	$	$	$	$	$165565	N/A	N/A
$ 947	$ 11644	$ 2600	$ 10565	$ 4333	$ 2515	$ 2424	$ 1477	$ 3922	$ 38543	896	68456
2794	3622	1828	2998	3121	961	3024	577	1076	48983	4548	47543
1397	4617	561	708	13693	492	5843	1571	1470	98789	N/A	N/A
5765	3299	1572	283	7943	97	(205)	650	884	51522	N/A	N/A
1358	15756	4175	—	21705	2114	3402	1344	3145	49996	1298	100870
5880	12477	4152	9162	4800	4630	3631	2146	2572	44730	804	75560
$18141	$ 51415	$ 14888	$	$	$	$	$	$	$332563	N/A	N/A

(all dollar amounts in thousands)

Fleet Name, City, State	Gross Revenues	Total Operating Expenses	Net Operating Income	Operating Ratio	Interest Expense	Other Income Adjustments	Income/ Deferred Taxes	Net Income	Net Profit Margin, %
HOUSEHOLD GOODS									
ALLIED VAN LINES, INC., NAPERVILLE, IL	$ 383626	$ 377150	$ 6476	98.3	$ [illegible]	$ [illegible]	$ [illegible]	$ [illegible]	[illegible]
ATLAS VAN LINES, INC., EVANSVILLE, IN	201007	189076	11931	94.1	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
BEKINS VAN LINES CO., HILLSIDE, IL	212650	210286	2364	98.9	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
BURNHAM SERVICE CO., INC., COLUMBUS, GA	96144	87520	8624	91.0	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
MAYFLOWER TRANSIT, INC., INDIANAPOLIS, IN	314226	305343	8884	97.2	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
NORTH AMERICAN VAN LINES, INC., FT. WAYNE, IN	817895	795636	22259	97.3	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
UNITED VAN LINES, INC., FENTON, MO	440284	440199	85	100.0	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
TOTAL HOUSEHOLD GOODS	$ [illegible]	$ [illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Definitions and Explanations Of Financial Terminology Used On The Charts

Operating Ratio: Operating expenses as a percentage of gross revenues. Since it excludes extraordinary expenses, income taxes and interest, individual peculiarities are eliminated so the ratio may be used as an industry-wide measure of performance.

Other Fringes: Includes charges such as federal and state payroll taxes, group and workers' compensation insurance, pension and retirement plans through both commercial insurance and unions.

Maintenance/Operating Supplies and Expenses: Includes fuel, oil, lubricants and coolants, vehicle parts, vehicle maintenance by outside vendors, tires and tubes, and miscellaneous supplies such as hand tools, brake fluid and antifreeze.

General Supplies and Expenses: Includes costs of administrative supplies including computer software, books, magazines, magnetic tapes, postage, stationery, printing of tariffs, advertising, commission agent fees, solicitation commissions, company personnel's T&E expenses. Also building and equipment rents and miscellaneous expenses such as fees for professional services by physicians, attorneys, etc., plus uncollectable revenues.

Operating Taxes and Licenses: Includes fuel and oil taxes, vehicle license and registration fees based on usage, real estate and personal property taxes, and tax items such as capital stock taxes, gross receipts taxes, occupancy taxes, etc.

Depreciation and Amortization & Gain or Loss on Disposition or Operating Assets: Includes depreciation of structures on owned land, revenue and shop equipment, furniture and office equipment, amortization of improvements to leasehold property, fixed term motor carrier franchises, permits, licenses, patent rights, etc., gain or loss on disposition of operating assets such as sold, traded or retired tractors, trailers and trucks.

Revenue Equipment Rents and Purchased Transportation: Includes amounts payable for furnishing vehicles with or without the services of drivers, transportation of shipments in another carrier's vehicle including intermodal fleets, and allowance to shippers for picking up or delivering freight to a carrier's facility.

THE Top 100

were $29,041,440, a 6.9% increase over 1987. With revenues increasing at a faster pace than expenses, the top for-hire fleets had an aggregate 94.8 operating ratio last year. In 1987, the Top 100 had an average OR of 96.5.

Although those numbers represent improvement over 1987, the Top 100 didn't enjoy a boom year in 1988. Their profit performance last year—based on a comparison of operating ratios—was a little short of the margins realized in the 1984-86 period when the average ORs were 94.5, 94.3 and 94.0, respectively.

Total expenses increased 6.9% over 1987.

Four fleets capture increasing share of revenue

Year	UPS	Yellow	CF	Roadway	4 Fleets Combined
1968	8.4%	2.4%	4.9%	3.8%	19.5%
1969	9.8%	2.6%	4.9%	3.8%	21.1%
1970	12.3%	3.0%	4.9%	4.3%	24.5%
1971	12.3%	3.0%	4.5%	4.4%	24.1%
1972	13.3%	3.2%	4.3%	4.7%	25.5%
1973	13.2%	3.4%	4.3%	4.9%	25.8%
1974	13.2%	3.6%	4.3%	5.1%	26.2%
1975	16.4%	3.7%	4.2%	5.1%	29.3%
1976	14.9%	3.9%	4.5%	5.3%	28.6%
1977	16.8%	4.1%	4.4%	5.5%	30.9%
1978	16.7%	4.1%	4.6%	5.5%	30.9%
1979	17.5%	4.3%	4.5%	5.8%	32.0%
1980	19.8%	3.6%	4.7%	5.8%	33.9%
1981	21.3%	4.1%	4.6%	5.2%	35.3%
1982	23.8%	4.4%	5.0%	5.6%	38.8%
1983	25.3%	4.8%	5.1%	5.7%	41.0%
1984	25.2%	5.5%	5.2%	5.7%	41.5%
1985	27.1%	5.6%	5.3%	5.7%	43.7%
1986	27.4%	6.0%	5.5%	5.6%	44.5%
1987	28.6%	6.2%	5.5%	5.7%	46.0%
1988	29.9%	6.5%	5.7%	5.5%	47.7%

Biggest get even bigger

And, as has been the case since CCJ started providing data on the Top 100 in 1969, four less-than-truckload carriers have dominated the for-hire industry, based on revenues. As reflected in the chart, Yellow Freight System, United Parcel Service (UPS), Consolidated Freightways and Roadway Express continue to gradually increase their share of the nation's freight, to the point that they may soon control one-half of the traffic handled by the Top 100 fleets.

Last year, based on the consolidation of financial data for its two corporate entities, UPS led the pack once again with $9.1 billion, a 13.5% hike in gross revenues compared to 1987. The package delivery fleet headquartered in Greenwich, Conn., rang up $428.7 million in operating income in 1988, 30% better than the previous year. And UPS' 95.3 OR was slightly better than the 95.9 garnered in 1987.

Yellow Freight improved the most, compared to the other three leading LTL carriers, with gross sales increasing 14.4% to $1.9 billion and a 50.4% jump in operating profits which hit $110.1 million. As a result, the Overland Park, Kan.-based carrier's OR dropped from 95.8 in 1987 to 94.5 last year.

Consolidated Freightways ranked third in the Top 100 with $1.75 billion in gross sales last year, a 12.5% increase over 1987. The Portland, Ore.-based fleet tallied $105.8 million in operating income in 1988, a 37.9% improvement over the previous year's profit level. Thus, the OR declined from 95.1 in 1987 to 93.9 last year.

Text continues on page 82

TOP 100

(all dollar amounts in thousands)

1988 Revenue Rank	Fleet Name, City, State	Carrier Type	1988 Gross Revenues	1987 Gross Revenues	1987 Revenue Rank	Operating Ratio			
						1988	Rank	1987	Rank
1	UNITED PARCEL SERVICE (OHIO), GREENWICH, CT	CMGF	$6608037	$5828293	1	93.6	33	94.3	T34
2	UNITED PARCEL SERVICE (NEW YORK), GREENWICH, CT	CMGF	2526709	2220415	2	99.9	87	100.0	75
3	YELLOW FREIGHT SYSTEM, INC., OVERLAND PARK, KS	CMGF	1991602	1740696	3	94.5	42	95.8	45
4	CONSOLIDATED FREIGHTWAYS CORP (DEL), PORTLAND, OR	CMGF	1749180	1555217	5	93.9	T35	95.1	39
5	ROADWAY EXPRESS, INC., AKRON, OH	CMGF	1693597	1596304	4	94.1	T39	94.6	37
11	ANR FREIGHT SYSTEM, INC., DENVER, CO	CMGF	468009	405920	12	101.5	T92	103.1	86
12	UNITED VAN LINES, INC., FENTON, MO	CMHG	440284	419414	11	100.0	88	100.9	77
13	J.B. HUNT TRANSPORT, INC., LOWELL, AR	CMGF	392553	296419	18	84.8	5	85.0	4
14	ALLIED VAN LINES, INC., NAPERSVILLE, IL	CMHG	383626	382738	13	98.3	T75	99.1	67
15	PRESTON TRUCKING COMPANY, INC., PRESTON, MD	CMGF	368044	318852	16	97.1	T63	100.1	76
21	TRANSCON LINES, LOS ANGELES, CA	CMGF	266061	333755	15	108.6	99	103.3	T87
22	RYDER DISTRIBUTION RESOURCES, INC., MIAMI, FL	CTGS	251755	206462	NR	98.0	74	98.1	NR
23	SIGNAL DELIVERY SERVICE, INC., DOWNERS GROVE, IL	CMSC	248725	232276	22	95.8	T50	97.5	55
24	COMPLETE AUTO TRANSIT, INC., BLOOMFIELD HILLS, MI	CTMV	247180	234727	24	93.9	T35	93.0	T24
25	MATLACK, INC., WILMINGTON, DE	CTLP	227694	204301	26	97.0	T61	98.6	62
31	BUILDERS TRANSPORT, INC., CAMDEN, SC	CMGF	203861	185258	32	96.0	53	92.7	T21
32	ATLAS VAN LINES, INC., EVANSVILLE, IN	CMHG	201007	184754	33	94.1	T39	94.2	T30
33	ALLIED SYSTEMS, LTD.,[2] DECATUR, GA[2]	CMMV	200822	N.A.		96.6	55	N.A.	—
34	COMMERCIAL CARRIERS, INC., BLOOMFIELD HILLS, MI	CMMV	198043	189539	29	92.8	T27	92.2	20
35	WERNER ENTERPRISES, INC., OMAHA, NE[3]	CMGF	191438	139088	40	85.3	6	84.6	3
41	INDEPENDENT FREIGHTWAYS, INC., ROCKFORD, IL[3]	CMSC	130802	129391	NR	98.7	T80	98.2	NR
42	A-P-A TRANSPORT CORP., NORTH BERGEN, NJ	CMGF	129151	118918	47	93.5	T31	92.9	23
43	TNT RED STAR EXPRESS, INC., AUBURN, NY	CMGF	127420	114306	49	96.1	54	95.5	T41
44	SOUTHEASTERN FREIGHT LINES, COLUMBIA, SC	CMGF	119983	101860	54	92.3	26	94.4	36
45	AAA COOPER TRANSPORTATION, DOTHAN, AL	CMGF	116472	92113	60	87.9	11	90.4	T14

For Top 100 listings under "Type": BM-building materials; CM-common; CT-contracts; GF-general freight; ED-explosives/dangerous articles; FP-forest products; HG-household goods; HM-heavy machinery; LP-liquid petroleum products (included, in most cases, other bulk commodities); MV-motor vehicles; RS-retail store delivery; SC-specific commodity not otherwise grouped.
T: Tie in Operating Ratio. NR: Not Ranked

(all dollar amounts in thousands)

1988 Revenue Rank	Fleet Name, City, State	Carrier Type	1988 Gross Revenues	1987 Gross Revenues	1987 Revenue Rank	Operating Ratio			
						1988	Rank	1987	Rank
51	CONTRACT FREIGHTERS, INC., JOPLIN, MO[4]	CMSC	99207	82039	64	85.5	7	88.4	10
52	KLLM TRANSPORT SERVICES, INC., JACKSON, MS	CMRC	97410	75229	70	91.4	T22	90.4	T14
53	BURNHAM SERVICE COMPANY, INC., COLUMBUS, GA	CMHG	96144	93878	58	91.0	T17	88.5	11
54	CRETE CARRIER CORPORATION, LINCOLN, NE	CMGF	95939	89008	61	95.1	44	94.3	T34
55	ADVANCE TRANSPORTATION COMPANY, MILWAUKEE, WI	CMGF	94977	76072	68	97.1	T63	97.4	54
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
61	CON-WAY WESTERN EXPRESS, PORTLAND, OR	CMGF	88799	65992	87	86.9	8	87.9	8
62	FFE TRANSPORTATION SERVICES, INC., DALLAS, TX	CMRC	88699	83261	63	95.0	43	96.4	49
63	MERCHANTS FAST MOTOR LINES, INC., ABILENE, TX	CMGF	88593	76389	67	99.4	84	102.4	82
64	ESTES EXPRESS LINES, RICHMOND, VA	CMGF	88446	79518	66	84.4	T3	85.5	5
65	COUNTRY WIDE TRUCK SERVICE, INC., POMONA, CA	CMGF	87834	72664	75	99.5	T85	93.0	T24
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
71	HYMAN FREIGHTWAYS, INC., ST. PAUL, MN	CMGF	84864	73533	74	99.5	T85	98.7	T63
72	ANDERSON TRUCKING SERVICE, INC., ST. CLOUD, MN	CMSC	83822	74720	71	94.2	41	96.5	50
73	MUNSON TRANSPORTATION, INC., MONMOUTH, IL	CMGF	82933	66091	86	91.1	19	90.3	13
74	CASSENS TRANSPORT COMPANY, EDWARDSVILLE, IL	CMMV	81129	67218	84	95.8	T50	99.9	T72
75	UNIVERSAL AM-CAN, LTD., STERLING HEIGHTS, MI	CMGF	78614	65506	89	93.2	30	94.2	T30
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
81	WILLIG FREIGHT LINES, SAN FRANCISCO, CA	CMGF	75572	68629	80	92.9	29	93.2	26
82	G.I. TRUCKING COMPANY, LA MIRADA, CA	CMGF	75001	61962	100	103.5	97	98.7	T63
83	ROADRUNNER TRUCKING, INC., ALBUQUERQUE, NM	CMGF	74270	60110	NR	91.0	T17	91.9	RN
84	MILLER TRANSPORTERS, INC., JACKSON, MS	CMLP	74048	66936	85	96.9	T58	95.2	40
85	SAIA MOTOR FREIGHT LINE, INC., HOUMA, LA	CMGF	73441	62586	95	87.2	10	86.9	T6
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
91	JONES TRANSFER COMPANY, MONROE, MI	CMGF	71996	71372	76	103.3	95	101.5	78
92	DSI TRANSPORTS, INC., DEER PARK, TX	CMLP	69627	55245	NR	91.4	T22	91.4	NR
93	MIDWEST COAST TRANSPORT, INC., SIOUX FALLS, SD	CMRC	69174	70747	78	97.5	70	96.2	T47
94	REFINERS TRANSPORT & TERMINAL CORP., CLEVELAND, OH	CMLP	69039	65686	88	103.4	96	105.2	92
95	TRANSUS, INC., ATLANTA, GA	CMGF	68787	75734	69	99.1	82	107.9	96
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
100	NATIONAL CARRIERS, INC., LIBERAL, KS	MS	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

	Gross Revenue	Expenses	Post Tax Net Income
TOTAL TOP 100—1988	$30,540,353	$29,041,440	$937,809
TOTAL TOP 100—1987	$28,155,417	$27,157,323	$480,580
TOTAL TOP 100—1986	$26,898,993	$25,083,023	$943,215

TOP 100

(all dollar amounts in thousands)

1988 Revenue Rank	Fleet Name, City, State	Carrier Type	1988 Gross Revenues	1987 Gross Revenues	Operating Ratio	
					1988	1987
101	MARTEN TRANSPORT, LTD., MONDOVI, WI	CMRC	67173	57557	94.2	90.2
102	GRAEBEL VAN LINES, INC., WAUSAU, WI	CMHG	66870	62118	99.5	98.2
103	CARRETTA TRUCKING, INC., PARAMUS, NJ	CMGF	65658	57275	97.3	93.5
104	PAULS TRUCKING CORPORATION, AVENEL, NJ	CTSC	65337	65326	97.5	96.1
105	ACE TRANSPORTATION, INC., LAFAYETTE, LA	CMSC	64532	43790	95.3	94.4
[illegible]						
111	C.R. ENGLAND & SONS, SALT LAKE CITY, UT	CMGF	59286	40483	90.2	92.3
112	WILSON TRUCKING CORP., FISHERVILLE, VA	CMGF	58807	55456	89.8	88.0
113	FREYMILLER TRUCKING, INC., BAKERSFIELD, CA	CMGF	58736	42103	93.9	90.2
114	GLOBAL VAN LINES, INC., ORANGE, CA	CMHG	58605	61044	98.4	98.3
115	McGIL SPECIALIZED CARRIERS, MARIETTA, GA	CMSC	57970	51285	98.2	97.4
[illegible]						
121	FORE WAY EXPRESS, INC., WAUSAU, WI	CMGF	55776	44096	98.1	96.8
122	MONFORT TRANSPORTATION CO., GREELEY, CO	CMGF	55749	38764	92.8	91.6
123	JONES TRUCK LINES, INC., SPRINGDALE, AR[1]	CMGF	54910	188299	97.3	94.1
124	SOUTHWESTERN MOTOR TRPT, SAN ANTONIO, TX	CMGF	54723	47810	95.1	97.6
125	ALTERMAN TRANSPORT LINES, OPA LOCKA, FL	CMRC	54508	53950	99.7	97.2
[illegible]						
131	CONWAY EASTERN EXPRESS, INC., PORTLAND, OR	CMGF	51794	42649	110.4	115.8
132	HADLEY AUTO TRANSPORT, SANTA ANA, CA	CTMV	50001	46751	91.5	91.9
133	COLONIAL FREIGHT SYSTEMS, KNOXVILLE, TN	CMRC	49794	42242	96.3	96.4
134	McKENSIE TANK LINES, INC., TALLAHASSEE, FL	CMLP	49349	45858	94.1	94.9
135	CROUSE CARTAGE COMPANY, CARROLL, IA	CMGF	48965	44496	96.4	100.5
[illegible]						
141	PIONEER TRANSPORTATION SYSTEMS, HURLOCK, MD	CMGF	47874	N.A.	96.3	N.A.
142	WHEATON VAN LINES, INC., INDIANAPOLIS, IN	CMHG	47651	44591	94.4	94.3
143	THE O.K. TRUCKING COMPANY, CINCINNATI, OH	CMGF	47075	47411	97.6	108.0
144	CONTRACT TRANSPORTATION SYS., CLEVELAND, OH	CTGF	46748	53282	94.6	90.7
145	SHAFFER TRUCKING, INC., NEW KINGSTOWN, PA	CMRC	46286	46913	92.7	91.0
[illegible]						

Carriers among the top 100 in 1987 who are no longer in operation are: *American Freight System, Pilot Freight Carriers, CW Transport,* and *Overland Express.*

Carriers with revenues sufficient to rank them among the top 100, but for whom data was not received in time, include: *Bowman Transportation, Inc.* (Atlanta, GA); *Brown Transport Corp.* (Elberton, GA) [Brown had acquired *Thurston Motor Lines, Inc.* of Charlotte, NC, another top 100 carrier]; *National Freight* (Vineland, NJ); and *Whiteford Truck Lines* (South Bend, IN).

[1]*Ranger Transportation, Independent Freightways,* and *Gemini* are part of the *Landstar* Group of carriers. Others in the group for which data could not be obtained for 1988 are *Poole Truck Lines* (Evergreen, AL) and *Ligon Nationwide* (Madisonville, KY).

[2]*Allied Systems "Ltd"* is a consolidated group consisting of *Auto Convoy Company* and *Motor Convoy, Inc.* formed in August 1988. The Motor Convoy had previously ranked 46 among the CCJ Top 100; Auto Convoy Company had ranked number 92.

(all dollar amounts in thousands)

1988 Revenue Rank	Fleet Name, City, State	Carrier Type	1988 Gross Revenues	1987 Gross Revenues	Operating Ratio 1988	Operating Ratio 1987
151	KENAN TRANSPORT COMPANY, CHAPEL HILL, NC	CMLP	44822	39753	90.1	86.8
152	ROEHL TRANSPORT, INC., MARSHFIELD, WI	CMGF	44707	36598	86.1	86.5
153	GORDON TRUCKING, INC., SUMNER, WA	CMGF	44272	N.A.	95.0	N.A.
154	DI SALVO TRUCKING CO., SAN FRANCISCO, CA	CMGF	42779	41346	101.7	97.4
155	ARMELLINI EXPRESS LINES, PALM CITY, FL	CMSC	42024	42085	98.5	97.2
156	BULLDOG TRUCKING, INC., CARNEGIE, OK	CMGF	41800	41488	90.7	84.2
157	MIDDLE WEST FREIGHTWAYS, INC., ST. LOUIS, MO	CMGF	41716	39840	97.6	99.2
158	STANDARD TRUCKING COMPANY, CHARLOTTE, NC	CMGF	41744	38847	96.2	104.9
159	FREDRICKSON MOTOR EXPRESS, CHARLOTTE, NC	CMGF	41484	42795	100.2	98.4
160	LENERTZ, INC., SOUTH ST. PAUL, MN	CMGF	41178	44063	98.0	97.2
161	GLENN McCLENDON TRUCKING CO., LAFAYETTE, AL	CMGF	41009	36776	96.6	98.6
162	WARD TRUCKING CORP., ALTOONA, PA	CMGF	40992	37911	99.9	104.9
163	TLC LINES, INC., FENTON, MO	CMGF	40800	33606	96.3	96.3
164	SAM TANKSLEY TRUCKING, CAPE GIRARDEAU, MO	CMGF	40775	39297	103.4	102.7
165	GEORGE TRANSFER, INC., PARKTON, MD	CMGF	40200	36315	96.6	96.3
166	SCHANNO TRANSPORTATION, WEST CHICAGO, IL	CMSC	40178	39644	95.9	95.0
167	NORTH PENN TRANSFER, INC., SPRINGDALE, PA	CMGF	39874	41091	98.9	105.4
168	LYNDEN TRANSPORT, INC., KENT, WA	CMGF	39826	38720	99.6	97.6
169	MOTOR CARGO, INC., SALT LAKE CITY, UT	CMGF	39638	40864	87.9	88.8
170	THE McKEE COMPANY, DES MOINES, IA	CMSC	39614	44240	98.1	97.5
171	LEASEWAY DELIVERIES, INC., DOWNERS GROVE, IL	CMSC	39184	N.A.	99.7	N.A.
172	NTC OF AMERICA, INC., TULSA, OK	CMSC	39017	42233	99.6	97.7
173	BULKMATIC TRANSPORT COMPANY, CHICAGO, IL	CMSC	39002	33687	93.2	94.9
174	PACIFIC MOTOR TRANSPORT, SAN FRANCISCO, CA	CMGF	38811	36039	94.1	93.8
175	PBX, INC., DAKOTA CITY, NE	CTRC	38704	37611	86.4	91.0
176	PUGH TRUCK LINES, INC., KNOXVILLE, TN	CMLP	38586	36436	84.7	85.0
177	THE MANFRED MOTOR TRANSPORT, NEWBURY, OH	CMSC	38548	45479	93.3	93.7
178	G. HAERMAN TRUCKING, MILWAUKEE, WI	CMSC	38484	34084	96.9	95.1
179	THE MASON & DIXON LINES, INC., KINGSPORT, TN	CMGF	38410	35430	96.9	96.9
180	QUALITY CARRIERS, INC., VERMONT, PRAIRIE, WI	CMLP	37965	37111	96.4	96.2
181	ACME TRUCK LINE, INC., HARVEY, LA	CMGF	37497	30651	95.8	95.2
182	INDUSTRIAL FREIGHT SYSTEM, SUN VALLEY, CA	CMGF	37290	24692	99.7	97.6
183	SOUTHWEST MOTOR FREIGHT, CHATTANOOGA, TN	CMGF	37203	N.A.	103.0	N.A.
184	GREAT COASTAL EXPRESS, RICHMOND, VA	CMGF	36812	35326	85.6	87.8
185	GROSS COMMON CARRIERS, WISCONSIN RAPIDS, WI	CMGF	36160	29536	99.7	101.5
186	FLEET CARRIER CORPORATION, TUNTAS, MI	CMGF	36044	36857	90.8	90.5
187	UMTHUN TRUCKING COMPANY, EAGLE GROVE, IA	CMGF	35710	33466	94.9	95.9
188	ASSOCIATED PETROL CARRIERS, SPARTANBURG, SC	CMLP	35696	32818	100.3	101.5
189	DIETZ-URRAGE TRUCKING CO., THEALKA LAKE, MS	CMGF	35610	N.A.	95.8	N.A.
190	A.J. METTLER HAULING & RIGGING, KNOXVILLE, TN	CMSC	35144	32454	98.3	98.9
191	SMITHWAY MOTOR XPRESS, INC., FORT DODGE, IA	CMGF	34809	34736	95.0	97.6
192	HEARTLAND EXPRESS INC., CORALVILLE, IA	CMGF	34571	26018	94.7	98.5
193	BLUE RIDGE TRANSFER CO., INC., ROANOKE, VA	CMGF	34527	35593	98.7	98.6
194	ENTERPRISE TRANSPORTATION CO., HOUSTON, TX	CMLP	34340	31494	93.8	94.3
195	PAUL ARPIN VAN LINES, EAST GREENWICH, RI	CMHG	34253	31323	96.6	95.6
196	U.S. TRUCK COMPANY, INC., DETROIT, MI	CMGF	34241	26571	96.3	100.6
197	HOLMES FREIGHT LINES, INC., OMAHA, NE	CMGF	33953	27326	91.8	99.1
198	REDWING CARRIERS, INC., TAMPA, FL	CMGF	33431	31320	95.0	98.0
199	J.H. WARE TRUCKING, INC., FULTON, MO	CMGF	32900	25333	97.5	98.2
200	TOLLIE FREIGHTWAYS, INC., KANSAS CITY, KS	CMGF	32827	29634	93.8	94.7

[3]*Werner's* figures are for the fiscal year ended February 28, 1989.

[4]*Contract Freighters'* data is based on quarterly reports, which do not provide sufficient information to include them in the detailed tables on subsequent pages.

[5]*Jones Truck Line* data reflects the period of operations from October 5, 1988 through Jan 2, 1989 only, due to the acquisition of the company from *Sun Carriers* on October 4.

NR—Not ranked among top 100 in previous year.

N.A.—Not available.

THE TOP 100

Roadway Express's gross revenues reached $1.69 billion last year, a 6.1% increase over 1987. Operating income for 1988 was $100.6 million, 16.3% higher than the previous year. Headquartered in Akron, Oh., Roadway's OR declined from 94.6 in 1987 to 94.1 last year.

Yellow had the most improvement (+10.4%) in tons per load in 1988, compared to the previous year. CF hauled 4.6% more tonnage last year. Roadway averaged 6.5 tons per load in both 1988 and 1987.

Koch Services had lowest OR

Koch Service, the Wichita, Kan. tank truck carrier, had the lowest OR – 80.6 – in '88.

Koch just edged the 81.6 OR earned by New Penn Motor Express. The Lebanon, Pa.-based regional LTL carrier had the lowest OR the two previous years.

New Penn, however, had the highest net profit margin, 14.69%, while Koch Services' net profit level was 12.07%.

Other fleets that had ORs under 85 last year are: Estes Express, Richmond, Va., and M.S. Carriers, Memphis, Tenn., both garnering 84.4s, and J.B. Hunt, Lowell, Ark., 84.8.

None of the auto carriers, reefer fleets or household goods carriers reporting had an OR under the 90 mark.

> None of the auto carriers, reefer fleets or household goods carriers had an OR under the 90 mark.

A beleaguered Transcon Lines, Los Angeles, had the highest operating loss (-$22.8 million) and suffered with a 108.6 OR. Although its $6.0 million operating loss wasn't as devastating, Spartan Express, Greer, S.C., had the highest OR – 108.8.

But several fleets' revenues increased significantly in 1988. AAA Cooper reported a $24.4 million sales boost, pushing the Dothan, Ala. regional LTL carrier from the 60th spot on the Top 100 rankings for 1987 to the 45th position for 1988. And Con-Way Western Express, Portland, Ore., moved from number 87 to the 61st place among the Top 100 ratings with $88.8 million in gross revenues last year.

Specialized carriers

Once again, Matlack ($227.7 million), Wilmington, Del., edged Chemical Leaman ($214.4 million), Exton, Pa., for revenue honors among the bulk carriers.

Among the car carriers, Complete Auto Transit, Bloomfield Hills, Mich., had the highest operating income – $15.1 million – and Commercial Carriers, Southfield, Mich., had the lowest OR – 92.8.

KLLM Transport Service, Jackson, Miss., led the refrigerated carriers across the board, with $97.4 million in sales and $8.4 million in operating profits, plus a 91.4 OR.

Although North American Van Lines, Fort Wayne, Ind., had the highest revenue ($81.8 million) and operating profit ($22.3 million), the 91.0 OR by Burnham Service, Columbus, Ga., registered the lowest OR – 91.0.

Top 200

Ploff Trucking, Jacksonville, Fla., had an 84.7 OR, the lowest operating ratio among the fleets that ranked between 101 and 200 of the nation's leading for-hire fleets.

Great Coastal Express, Richmond, Va., had the group's next best OR – 85.6.

Among the 101-200 group's best sales performer's in 1988 were:

- Ace Transportation, Lafayette, La., a $19.7 million increase to $64.5 million.
- C.R. England and Sons, Salt Lake City, Ut., with a $18.8 million revenue hike to $59.3 million. □

Where the Top 100 data comes from

Top 100 data is based on information filed with the Interstate Commerce Commission by Class I and II for-hire carriers. The statistics are compiled exclusively for CCJ by the American Trucking Associations.

Since carriers' reporting and deadline requirements have been changed by the ICC, some detailed information on carriers' equipment and maintenance activities is only available for less-than-truckload fleets. With the exception of household goods carriers which weren't required to provide the information, significant financial data has been added to the Top 100 charts.

And fleets designated as contract carriers aren't included since they aren't required to file quarterly reports with the ICC.

Top 100 and Trends and Statistics are available in a booklet for $5. For a single copy of the booklet, write on company letterhead to: Reprint Editor, Commercial Carrier Journal, Chilton Way, Radnor, Pa. 19089. Send prepaid check or money order.

INDUSTRY TRENDS AND STATISTICS

A strong 1988 economy generated few complaints about business opportunities. Carrier earnings were up as were factory sales of new vehicles and equipment.

By JERRY STANDLEY, *Editor-In-Chief*, and MARGARET ROMAN-SLAVIN, *Market Research Editor*

STATISTICAL ANALYSIS OF THE TRUCK INDUSTRY—PRIVATE AND FOR-HIRE CARRIAGE*

FLEET SIZE	TOTAL FLEETS	TOTAL VEHICLES *	# OF STRAIGHT TRUCKS OPERATED	# OF TRACTORS OPERATED	# OF TRAILERS OPERATED	# OF BUSES OPERATED	# OF OFF-HIGHWAY VEHICLES OPERATED
500 & over	3,311	4,938,115	1,652,366	843,597	1,805,389	223,268	413,495
100 – 499	12,834	2,377,474	746,194	434,722	825,991	149,048	221,519
50 – 99	13,658	895,347	292,127	162,791	278,335	63,275	98,819
25 – 49	20,943	697,611	264,726	114,360	184,051	54,045	80,429
10 – 24	29,153	456,766	210,857	68,782	101,066	27,351	48,710
TOTAL	**79,899**	**9,365,313**	**3,166,270**	**1,624,252**	**3,194,832**	**516,987**	**862,972**
VOCATION OR BUSINESS							
Common/ Contract	17,595	2,727,478	262,337	789,376	1,596,470	28,121	51,174
Lease/Rental	3,198	1,105,436	412,468	276,414	365,751	20,348	30,455
Food Industry	9,445	753,731	270,547	138,993	292,847	6,009	45,335
Local, State & Federal Government	7,421	1,422,374	875,598	54,339	176,263	53,584	262,590
Construction/ Mining	12,867	736,651	283,291	64,178	216,808	2,969	169,405
Manufacturing/ Processing	6,436	549,278	204,598	75,858	210,739	7,411	50,672
Petroleum	3,055	150,778	69,411	25,445	40,917	907	14,098
Public Utility	3,661	570,909	418,655	12,060	74,092	3,998	62,104
Retail/ Wholesale Delivery	7,480	505,323	196,161	97,913	154,450	11,248	45,551
Sanitation & Refuse	987	56,797	37,764	5,909	8,961	69	4,094
Schools	4,352	289,717	54,242	4,416	7,183	212,208	11,668
Buses	1,337	178,642	8,301	1,389	3,533	163,484	1,935
Other	2,065	318,199	72,897	77,962	46,818	6,631	113,891
TOTAL	**79,899**	**9,365,313**	**3,166,270**	**1,624,252**	**3,194,832**	**516,987**	**862,972**

* Does not include passenger cars. *Source: CCJ Census of the Professional Truck Fleet Market, June 1989*

This chart segments the motor carrier industry by fleet size and vocation or business. Substantial procedural difficulty in obtaining accurate vehicle counts within four categories – large (500+) private and for-hire carriers with numerous vehicle operating locations, lease/rental fleets, government fleets and trailers – make it virtually impossible to eliminate a small amount of duplication remaining in the number of vehicles reported to be operated in *those market segments only!* All others vehicle counts are accurate as of June, 1989. CCJ estimates absolute maximum duplication in those four categories to be no higher than 10%. Those requiring a more detailed explanation for any of the above should contact CCJ's Marketing Dept., at 215-964-4521.

TRENDS & STATISTICS

NUMBER OF FOR-HIRE CARRIERS

Year	Class I (Over $5 Million)	Class II ($1-$5 Million)	Class III (Under $1 Million)	TOTAL*
1988	889	1,179	37,182	39,609
1987	856	1,266	35,505	38,338
1986	947	1,387	33,903	36,948
1985	1,013	1,489	30,337	33,283
1984	1,088	1,554	27,370	30,481
1983	1,139	1,631	24,411	27,517
1982	1,144	2,139	22,059	25,722
1981	1,031	2,293	18,563	22,270

Left: This chart logs the continuing consolidation of larger Class 1 and 2 carriers (Class 1 = revenues greater than $5 million; Class 2 = between $1 million and $5 million), as well as the growth in Class 3 (revenues less than $1 million). The number of Class 1 carriers has dropped 22% since the high of 1982, but the real squeeze is among Class 2 carriers, which have diminished 48.6% (by 1,114 carriers) since 1981. The Class 3 ranks have risen 154% (22,572) since 1980 levels of 14,610 carriers. However, the number for Class 3 can be misleading because they include all ICC authorized carriers, including private fleets with for-hire operating authority.

* The carrier totals for 1988 reflect 359 Class 1 and 2 carriers operating, but exempted from filing with the Interstate Commerce Commission. The number of exempted Class 1 and 2 carriers in previous years totaled: 711 in both 1987 and 1986; 444 in 1985; 469 in 1984; 336 in 1983; 380 in 1982; 383 in 1981.
Source: American Trucking Associations, Inc.

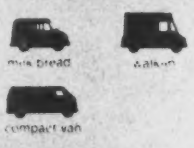
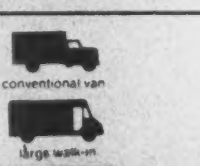
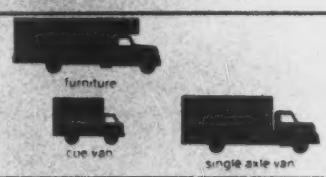
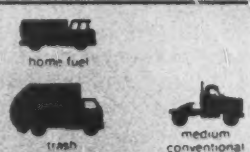
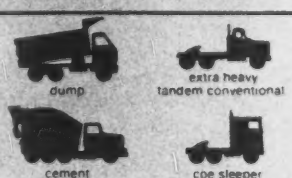
SELECTED FINANCIAL DATA FROM CLASS 1 AND CLASS 2 COMMON CARRIERS

	All General Freight & Specialized Carriers 1988 (000)	1987 (000)	Percent of Change (88-87)	Percent of Revenue (1988)
Number of Carriers	117	117		
GROSS OPERATING REVENUES	$12,619,184	$11,317,290	11.50%	100.00%
Salaries-Officers and Supervisors	$1,172,880	$1,072,911	9.32%	9.29%
Salaries & Wages & Paid Time Off	$4,698,681	$4,226,108	11.18%	37.23%
Other Fringes	$1,706,146	$1,473,469	15.79%	13.52%
Salaries, Wages & Fringe Benefits	$7,577,707	$6,772,488	11.89%	60.05%
Operating Supplies & Expenses	$1,068,126	$989,042	8.00%	8.46%
General Supplies & Expenses	$533,264	$490,074	8.81%	4.23%
Operating Taxes & Licenses	$408,062	$385,613	5.82%	3.23%
Insurance	$322,880	$290,281	11.23%	2.56%
Communication & Utilities	$199,898	$187,893	6.39%	1.58%
Depreciation & Amortization	$537,840	$503,225	6.88%	4.26%
Equipment Rental & Purch. Trptn.	$1,035,610	$979,762	5.70%	8.21%
Building & Office Equipment Rental	$144,695	$114,913	25.92%	1.15%
Other & Miscellaneous Expenses	$111,353	$95,165	17.01%	0.88%
TOTAL OPERATING EXPENSES	$11,939,435	$10,808,456	10.46%	94.61%
NET CARRIER OPERATING INCOME	$679,749	$508,834	33.59%	5.39%
NET INCOME BEFORE TAXES	$591,005	$429,488	37.61%	4.68%
NET INCOME AFTER TAXES	$385,520	$262,273	46.99%	3.06%
OPERATING RATIO	94.61	95.50		
NET PROFIT MARGIN	3.06	2.32		
Vehicle Miles Traveled	3,977,558	3,729,777	6.64%	
Tons Handled	84,156	77,842	8.11%	

This chart compares totals and percentage changes in selected 1988 and 1987 financial items for 117 Class 1 & 2 Less-than-truckload common carriers. Changes in Interstate Commerce Commission (ICC) financial reporting requirements resulted in the exclusion of truckload carriers that were included in previous years' charts. Data is compiled by American Trucking Associations, Inc., Alexandria, Va., based on carrier financial reports (Form QFR) to the ICC by Class 1 and 2 "Instruction 27" carriers (75% or greater revenues derived from general commodity freight). Statistics from United Parcel Service, contract carriers and household goods movers are excluded from this chart. To provide accurate two-year comparisons, figures from 1987 are restated on the basis of those same carriers filing 1988 reports with the ICC.

15-YEAR FACTORY SALES OF TRUCKS BY GVW (1974 through 1988)

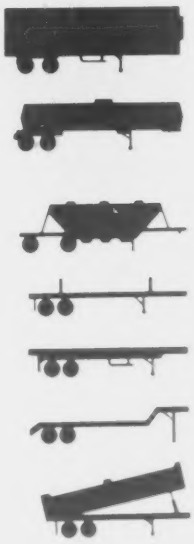
(Includes U.S. total domestic and export sales. Excludes tactical military vehicles and buses.)

	CLASS 1 **6,000 lb & Less**	No. of Units **20,829,840**	% of Total **51.20%**
	CLASS 2 **6,001-10,000 lb**	No. of Units **15,625,769**	% of Total **38.41%**
	**CLASS 3** **10,001-14,000 lb**	No. of Units **214,956**	% of Total **0.53%**
	**CLASS 4** **14,001-16,000 lb**	No. of Units **14,063**	% of Total **0.03%**
	CLASS 5 **16,001-19,500 lb**	No. of Units **79,213**	% of Total **0.19%**
	**CLASS 6** **19,501-26,000 lb**	No. of Units **1,324,891**	% of Total **3.26%**
	**CLASS 7** **26,001-33,000 lb**	No. of Units **826,661**	% of Total **2.03%**
	**CLASS 8** **33,001 lb & Over**	No. of Units **1,764,815**	% of Total **4.34%**
	TOTAL	**40,680,208**	**100.00%**

R.L. Polk estimates the total number of Class 1 - 8 trucks in use is 50,220,000. The R.L. Polk total includes imported vehicles, school buses and private fleet buses, but does not include municipal buses. The CCJ total listed above does not include buses or imports, and does not reflect a scrappage rate, which R.L. Polk estimates at 4.8% annually.

Source: Motor Vehicle Manufacturers Association, CCJ Marketing Dept.

BREAKDOWN OF NEW TRAILER SHIPMENTS (1974 through 1988)



	Number	% of Total
VANS		
Dry Freight/Closed Top	1,120,811	47.1
Dry Freight/Open Top	80,425	3.4
Insulated/Semi-Insulated	290,339	12.2
Drop Frame	72,279	3.0
Livestock	22,072	0.9
Total Vans	1,585,926	66.6
SPECIAL TYPES		
Tanks/Liquid	94,559	4.0
Dry Bulk	25,559	1.1
Pole and Logging	22,816	1.0
Platform	333,859	14.0
Low-Bed	103,198	4.3
Dump	109,516	4.6
All Others	104,383	4.4
Total Special Types	793,890	33.4
TOTAL COMPLETE TRAILERS	2,379,816	100.0
Detachable Trailers[1]	96,437	
Detachable Chassis[2]	237,475	
Dollies and Converter Gear[3]	54,729	

1. Mostly container units. 2. Mostly for use with containers. 3. Separate axle and fifth wheel assembly used to convert semi-trailer into full trailer for twin trailer operations.
Source: Industry Div., Bureau of the Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.

NEW TRAILER SHIPMENTS BY TYPE

Type of Trailer	1988	1987	1986	1985	1984
VANS					
Dry Freight/Closed Top	91,201	99,054	95,236	84,950	115,399
Dry Freight/Open Top	3,133	2,776	3,149	3,685	4,087
Insulated/Semi Insulated	24,884	26,650	22,654	21,934	27,768
Drop Frame	5,970	5,237	3,637	8,229	7,112
Livestock	2,203	1,663	1,996	1,421	2,234
Total Vans	127,391	135,380	126,672	120,219	156,600
SPECIAL TYPES					
Tanks/Liquid	5,230	4,827	4,792	5,670	4,818
Dry Bulk	1,020	1,030	1,233	1,477	1,556
Pole and Logging	796	1,060	1,163	1,977	3,371
Platform	17,566	15,219	14,011	18,839	25,685
Low-Bed	8,119	10,594	10,945	11,414	8,281
Dump	8,883	7,990	8,371	8,903	8,895
All Others	6,990	19,412	4,538	7,807	4,550
Total Special Types	48,604	60,132	45,053	56,087	57,156
TOTAL COMPLETE TRAILERS	175,995	195,512	171,725	176,306	213,756
Detachable Trailers[1]	4,931	563	595	286	983
Detachable Chassis[2]	32,174	7,560	6,334	15,591	44,877
Dollies/Converter Gear[3]	2,298	4,371	3,755	4,522	6,759

1. Mostly container units. 2. Mostly for use with containers. 3. Separate axle and fifth wheel assembly for converting semi-trailer into full trailer in twin trailer doubles operations.
Source: Industry Div., Bureau of the Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.

Overall truck trailer sales dropped 19,517 units (10%) last year, returning to moderate 1985 levels. Of the two main categories, Special Types accounted for the lion's share, falling 19% (11,528 units). This decrease was led by Low-Bed sales, which were down 23% (2,475 units). Pole and logging type sales dropped 25% (264 units). If the current surge of activity in the mining industry continues, sales of dump and other related trailer types may get a boost this year.

The Van trailer segment faired slightly better, yet still decreased 6% (7,989 units). Dry freight closed top and insulated semi-insulated vans declined 8% and 7% respectively. Optimism rises as better times in the agricultural market helped spark a 13% increase in dry freight open top and a 32% increase in livestock trailers.

DIESEL ENGINES USED IN TRUCKS

(Factory sales from U.S. plants including exports)

Make of Truck		Cat	Cummins	Detroit Diesel	International	Mack	All** Other	Total
Chevrolet	1988	1,428	–	22,595	–	–	–	**24,023**
	1987	1,595	–	35,134	–	–	– 16	36,745
Ford	1988	8,706	9,558	398	54,574	–	32,161	**105,397**
	1987	11,551	8,940	3,632	56,261	–	19,799	100,183
Freightliner	1988	7,444	14,948	1,296	–	–	–	**23,688**
	1987	7,301	15,758	512	–	–	–	23,571
GMC	1988	2,863	1,719	13,306	–	–	13	**17,901**
	1987	4,029	4,232	16,272	–	–	435	24,968
International	1988	1,517	21,969	5	46,520	–	–	**70,011**
	1987	1,396	20,117	327	38,144	–	–	59,984
Jeep Corp.	1988	–	–	–	–	–	3,917	**3,917**
	1987	–	–	–	–	–	9,260	9,260
Kenworth	1988	5,552	9,286	636	–	–	–	**15,474**
	1987	4,549	8,301	85	–	–	–	12,935
Mack	1988	251	203		–	22,112	102	**22,668**
	1987	187	252	40	–	19,713	1	20,193
Mercedes-Benz	1988	–	–	–			3,221	**3,221**
	1987	–	–	–			4,220	4,220
Peterbilt	1988	11,031	6,471	468	–	–	–	**17,970**
	1987	8,784	5,410	25	–	–	–	14,219
Volvo GM	1988	4,967	12,059	2,529	–	–	282	**19,837**
	1987	3,065	7,136	883	–	–	328	11,412
Others*	1988	296	5,020	76	–	–	–	**5,392**
	1987	368	592	143	–	–	–	1,103
Total	1988	44,055	81,233	41,309	123,206	22,112	39,696**	**329,499**
	1987	42,825	70,738	57,053	94,405	19,713	34,059**	318,793

Left: There was good and bad news in 1988 diesel engine sales, which were up 3.36% (10,706 units). International's diesel sales rocketed 30.51% (28,801 units), refelcting a surge in Class 6 sales, and strengthening it industry-leading market share of 37%. The bad news in 1988 was Detroit Diesel, whose engine sales plummeted 27.6% (15,744 units), mainly reflecting loss of business to General Motors, which sold the engine Division. * Others include: Oshkosh and Marmon.

** All Others includes: Isuzu, Mercedes-Benz, Scania-Vabis, Volvo, Ford, Renault (Mack) and GMC Deere. Reporting firms do not represent entire industry.

Source: *Motor Vehicle Manufacturers Association.*

Below: This chart illustrates the six-year performance of Class 1-8 domestic factory sales of trucks. Class 8 truck sales, the industry bellweather, were up 11% (13,704 units). That gain is overshadowed, however, by a dramatic 71.6% jump in Class 6 sales (12,240 units). International trucks, from Navistar, absorbed two-thirds of the Class 6 sales increase in the form of large volume orders for its 97-in. BBC model equipped with the International diesel engine. Class 7 sales continue their see-saw, this time down 6% (5,198 units), after an 8% upswing (6,744 units) in 1987.

DOMESTIC TRUCK FACTORY SALES BY GVW

	1988	1987	1986	1985	1984	1983
Class 1 (6000 lb and less)						
Total Sales	2,496,648	2,270,566	1,964,832	1,854,901	1,610,835	1,296,644
Diesel Sales	86	1,813	4,999	9,663	15,234	25,565
% Diesel	–	0.1%	0.3%	0.5%	0.9%	2.0%
Class 2 (6001-10,000 lb)						
Total Sales	1,020,515	976,803	927,462	989,633	997,626	787,611
Diesel Sales	79,535	85,125	96,443	123,882	122,995	89,161
% Diesel	7.8%	8.7%	10.4%	12.5%	12.3%	11.3%
Class 3-4 (10,001-16,000 lb)						
Total Sales	86	476	–	19,397	5	3
Diesel Sales	86	322	–	5,870	–	–
% Diesel	100%	67.6%	–	30.3%	–	–
Class 5 (16,001-19,500 lb)						
Total Sales	5,224	5,841	5,749	5,123	5,502	1,143
Diesel Sales	1,599	431	–	–	–	–
% Diesel	30.6%	7.4%	–	–	–	–
Class 6 (19,501-26,000 lb)						
Total Sales	29,332	17,092	17,846	25,810	29,273	24,310
Diesel Sales	17,429	9,184	9,265	14,253	13,789	9,703
% Diesel	59.4%	53.7%	51.9%	55.2%	47.1%	39.9%
Class 7 (26,001-33,000 lb)						
Total Sales	79,143	84,341	77,597	81,122	74,445	48,896
Diesel Sales	56,574	56,719	47,694	50,492	43,412	29,468
% Diesel	71.5%	67.2%	61.5%	62.2%	58.3%	60.3%
Class 8 (33,001 lb & Over)						
Total Sales	135,129	121,425	103,216	120,941	138,584	78,575
Diesel Sales	134,981	121,192	102,671	120,311	137,692	78,008
% Diesel	99.9%	99.5%	99.5%	99.4%	99.3%	99.1%

TRUCK FACTORY SALES AND TRUCKS WITH DIESELS

(U.S. domestic only; excluding tactical military vehicles)

GVW Group-ings	Truck Sales With Diesel Engines	Chevrolet	GMC	Chrysler	Ford	Freight liner	Inter national	Jeep Corp.	Kenworth	Mack	Mercedes-Benz	Peterbilt	Volvo GM	Others	Total Trucks
Under	Sales – 1987	747,435	182,861	256,007	813,941	–	–	167,604	–	–	–	–	–	102,718	2,270,566
6,000	w/Diesel – 1987	1,085	339	–	389	–	–	–	–	–	–	–	–	–	1,813
lb	Sales – 1988	860,869	201,005	313,388	826,121	–	–	199,346	–	–	–	–	–	95,919	2,496,648
	w/Diesel – 1988	84	1	–	1	–	–	–	–	–	–	–	–	–	86
6,001	Sales – 1987	323,710	92,778	41,671	502,835	–	–	15,809	–	–	–	–	–	–	976,803
to	w/Diesel – 1987	28,548	5,332	–	51,245	–	–		–	–	–	–	–	–	85,125
10,000	Sales – 1988	340,524	102,454	31,895	532,026	–	–	13,616	–	–	–	–	–	–	1,020,515
lb	w/Diesel – 1988	16,829	4,731	4,577	53,398	–	–	–	–	–	–	–	–	–	79,535
10,001	Sales – 1987	–	–	–	154	–	–	–	–	–	–	–	–	–	154
to	w/Diesel – 1987	–	–	–	–	–		–	–	–	–	–	–	–	–
14,000	Sales – 1988	–	–	–	–	–	–	–	–	–	–	–	–	–	– –
lb	w/Diesel – 1988	–	–	–	–	–	–	–	–	–	–	–	–	–	– –
14,001	Sales – 1987	–	–	–	–	–	322	–	–	–	–	–	–	–	322
to	w/Diesel – 1987	–	–	–	–	–	322	–	–	–	–	–	– –		322
16,000	Sales – 1988	–	–	–	–	–	86	–	–	–	–	–	–	–	86
lb	w/Diesel – 1988	–	–	–	–	–	86	–	–	–	–	–	–	–	86
16,001	Sales – 1987	239	5,602	–	–	–	–	–	–	–	–	–	–	–	5,841
to	w/Diesel – 1987	–	431	–	–	–	–	–	–	–	–	–	–	–	431
19,500	Sales – 1988	203	5,021	–	–	–	–	–	–	–	–	–	–	–	5,224
lb	w/Diesel – 1988	–	1,599	–	–	–	–	–	–	–	–	–	–	–	1,599
19,501	Sales – 1987	1,966	3,361	–	5,165	–	5,121	–	–	–	– 1,479	–	–	–	17,092
to	w/Diesel – 1987	377	992	–	1,215	–	5,121	–	–	–	– 1,479	–	–	–	9,184
26,000	Sales – 1988	2,178	7,560	–	5,367	–	13,157	–	–	–	1,070	–	–	–	29,332
lb	w/Diesel – 1988	422	929	–	1,851	–	13,157	–	–	–	1,070	–	–	–	17,429
26,001	Sales – 1987	8,483	19,132	–	30,854	–	23,703	–	–	–	2,169	–	–	–	84,341
to	w/Diesel – 1987	3,289	7,005	–	20,553	–	23,703	–	–	–	2,169	–	–	–	56,719
33,000	Sales – 1988	8,423	14,788	–	31,181	–	23,075	–	–	–	1,676	–	–	–	79,143
lb	w/Diesel – 1988	3,273	7,167	–	21,383	–	23,075	–	–	–	1,676	–	–	–	56,574
33,001	Sales – 1987	456	6,909	–	13,469	22,947	22,091	–	12,269	18,273	–	13,359	10,573	1,079	121,425
lb	w/Diesel – 1987	372	6,827	–	13,402	22,947	22,091	–	12,269	18,273	–	13,359	10,573	1,079	121,192
and	Sales – 1988	243	647	–	15,523	22,970	25,307	–	14,663	20,213	–	16,933	17,877	753	135,129
over	w/Diesel – 1988	206	599	–	15,460	22,970	25,307	–	14,663	20,213	–	16,933	17,877	753	134,981
Total	Sales – 1987	1,082,289	310,643	297,678	1,366,418	22,947	51,237	183,413	12,269	18,273	3,648	13,359	10,573	103,797	3,476,544
Total	w/Diesel – 1987	33,671	21,596	0	86,804	22,947	51,237	–	12,269	18,273	3,648	13,359	10,573	1,079	275,456
Total	Sales – 1988	1,212,440	313,331	345,283	1,410,218	22,970	61,625	212,962	14,663	20,213	2,746	16,933	17,877	96,672	3,747,933
Total	w/Diesel – 1988	20,814	15,026	4,577	92,093	22,970	61,625	–	14,663	20,213	2,746	16,933	17,877	753	290,290

Data are 1988 factory sales from U.S. plants only and does not include sales of vehicles resulting from joint venture agreements between foreign and domestic suppliers. Also, reporting firms do not represent entire industry. Volvo GM numbers include Autocar. Others include Marmon and Oshkosh. Volvo GM does not report separate factory sales figures for Class 8 Volvo, WhiteGMC and Autocar trucks (combined as 17,877 units above). *Others include: Nissan, Marmon and Oshkosh. *Source: MVMA.*

Continuing strong economic growth fueled an 11.1% rise in 1988 total truck factory sales, with Class 1 and Class 8 vehicles showing notable increases of 15.2% and 11.3%, respectively. Volvo GM totals reflect volume increases resulting from the newly formed company's addition of previous GMC heavy truck models. This moved the newly formed company into the number four market share position from number seven in '87. While Peterbilt claims the largest sales volume increase (26.8%), International regained its number one factory sales leadership in Class 8 with 25,307 units sold in 1988, comfortably nudging out Freightliner, which slipped to the number two slot with 22,970 units. The 236 unit decrease in Class 4 is misleading. For instance, 23,052 Ford Class 4 trucks were assembled in Canada and imported for sale in the U.S. market. Thus Class 4 sales activity is much stronger than that portrayed in this chart of U.S. Domestic factory sales chart.

PRIVATE FLEETS

By an overwhelming margin, private carriage is the dominant player in the U.S. trucking industry, based on the number of fleets in operation. Private carriage has become as complex as it is big. Using data collected by CCJ, these exclusive listings include a breakdown of types of vehicles the private carriers operate.

PRIVATE FLEETS

LEASE/RENTAL	Headquarters	Trucks	Tractors	Trailers	Cars	Off-Highway	Total Vehicles
G.E. Capital Fleet Services	Eden Prairie, Minn.	65,000	4800	5200	345,000	0	420,000
Ryder Truck Rental	Miami, Fla.	63,129	31,178	24,155	2209	120,754	241,425e
Enterprise Leasing Co	St. Louis, Mo.	7000	0	0	90,000	0	97,000
Automotive Rentals, Inc.	Maple Shade, N.J.	23,600	600	800	50,117	NA	75,117
Penske Truck Leasing Co.	Reading, Pa.	24,019	17,584	11,566	907	0	54,076e
NationaLease	Chicago, Ill.	10,850	21,800	17,450	NA	NA	50,100
TIP-Transport International Pool	Bala Cynwyd, Pa.	0	0	38,000	0	0	38,000
Amtralease	Cherry Hill, N.J.	10,000	12,000	8,000	1,000	0	31,000
AJF Leasing	St. Louis, Mo.	0	0	26,500	0	0	26,500
Transamerica Trailer Leasing	Piscataway, N.J.	0	0	20,000	0	0	20,000
Chancellor Fleet Corp	Boston, Mass.	425	4935	8530	0	1472	15,362
Ruan Trans. Mgt. Systems	Des Moines, Ia.	500	6600	6500	1000	0	14,600
Greenbrier Capital Corporation	San Francisco, Calif.	0	45	13,100c	0	0	13,145
Trucklease Corp (g)	Worcester, Mass.	3436	1211	1129	6835	311	12,922
Farm Credit Leasing Services	Minneapolis, Minn.	2838	949	2402	2786	1198	10,173
PLM Transportation Equipment	San Francisco, Calif.	0	275	9236	0	0	9511
PACCAR Leasing Corp.	Bellevue, Wash.	683	3309	637	0	0	4629
Transervice Lease Corp	Lake Success, N.Y.	1287	315	1297	56	293	3248
UPS Truck Leasing	Greenwich, Conn.	1450	1350	200	0	0	3000
Mendon Leasing Corp	Brooklyn, N.Y.	2500	a	0	100	0	2600
DeCarolis Truck Rental	Rochester, N.Y.	475	226	519	25	1274	2519
Edart Truck Rental Corp	Hartford, Conn.	700	650	500	75	2	1927
Action Mobile Office Rental	Carson, Calif.	9	7	1769	6	6	1797
Salem Leasing Corp	Winston-Salem, N.C.	106	690	811	0	0	1607
Gordon Thompson Industries	Jacksonville, Fla.	24	10	0	1050	0	1084
HUB Truck Rental, NY Reg	Farmingdale, N.Y.	906	75	0	22	0	1003
Doerrs Trailer Leasing (f)	Orlando, Fla.	0	3	944	1	2	950
Lease Line, Inc	N. Brunswick, N.J.	38	166	706	16	4	930
Maine Trailer	Bangor, Me.	5	3	741	6	0	755
Hunsaker Truck Lease, Inc	Dallas, Tex.	125	275	260	11	10	681
Clark Truck Leasing	Camden, N.J.	250	230	70	10	0	560

a – included in "Trucks." b – includes 12,000 units acquired with buyout of leasing operations of Leaseway. c – large capacity vans. d – does not include Transamerica Interway or Transamerica Trailco Services. e – includes 83 buses. f – regional fleet figures, not national. g – Trucklease cars controlled by Auto Rental Corp. Both are subsidiaries of Automotive Management, Inc. NA – not available.

PRIVATE FLEETS

GENERAL INDUSTRY	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	* % Leased
Honeywell, Inc	Minneapolis, Minn.	2629	0	0	4658	0	7287	120.4	100
Union Carbide Indus. Gases	Springfield, N.J.	10	400	500	3500	50	4460	NA	90
Pfizer Inc.	New York, N.Y.	550	3	3	2669	0	3225	76	50
Safety-Kleen Corp.	Elgin, Ill.	165	74	107	350	2400a	3096	53.6	0
Air Products & Chemicals, Inc	Allentown, Pa.	340	500	1360	500	170	2870	48	0
National Linen Service	Atlanta, Ga.	1965	25	30	400	NA	2420	37	0
Floyd S Pike Electrical Contractor	Mount Airy, N.C.	1314	4	511	48	513	2390	NA	0
Environmental Industries	Calabasas, Calif.	1100	35	535	166	416	2252	NA	0
Hoechst Celanese Corp	Somerville, N.J.	76	15	73	1872	3	2039	50	98
Greif Brothers Corp	Delaware, Oh.	43	272	1405	151	0	1871	NA	0
CW Wright Construction	Richmond, Va.	930	95	410	20	350	1805	9-10	0
Montgomery Ward & Co	Chicago, Ill.	1520a	0	0	220	0	1740	32	100
Trinity Industries	Dallas, Tex.	22	250	475	115	700	1562	21.0	10
American Greetings	Cleveland, Oh.	5	25	60	1400	0	1490	26	NA
Texas Industries, Inc	Dallas, Tex.	611	154	248	194	180	1387	NA	4
Caterpillar Tractor Co	Peoria, Ill.	300	60	365	450	0	1175	NA	72
Potlach Corp	San Francisco, Calif.	494d	89	96	124	363	1166	NA	0
Hillenbrand Industries, Inc	Batesville, Ind.	275	215	545	82	7	1124	25.5	0
Terminal Freight Handling Co.	Dallas, Tex.	4	237	821	2	10	1074	27	27
Sully-Miller Contracting Co	Long Beach, Calif.	569	111	226	66	30	1002	NA	9
Northrop Aircraft Div	Hawthorne, Calif.	279a,b	18	66	95	509c	967	6.1	1
Union Camp Corp	Wayne, N.J.	5	150	318	420	N/A	893	NA	65
Grossmans Div	Braintree, Mass.	125	16	80	160	450	831	2.2	40
Growmark, Inc	Bloomington, Ill.	5	123	679	0	0	807	9.5	7
McCrory Stores	York, Pa.	10	193	463	60	0	726	18	85
James Julian, Inc	Wilmington, Del.	130	20	90	20	450	710	2	0
Linder Industrial Machinery Co	Lakeland, Fla.	47	2	3	10	500	562	NA	0
Halliburton Services	Wichita, Ks.	53	128	150	60	141	532	.5	0
Scotty's Inc	Winter Haven, Fla.	315	34	180	0		529	NA	NA
LaRoche Industries Inc.	Atlanta, Ga.	85	55	81	102	5	328	NA	95

* – does not include cars. a – includes vans. b – includes light trucks. c – includes some miscellaneous equipment. d – includes light pick-ups. NA – not available

PRIVATE FLEETS

FOOD	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	* % Leased
Quality Bakers America	Greenwich, Ct.	17,000	9850	11,000	2850	0	40,700	NA	15
Continental Baking	St. Louis, Mo.	9015	720	756	404	12	10,907	181.7	48
ARA Services	Philadelphia, Pa.	5734	30	30	2376	940	9110	273	41
Fleming Companies	Oklahoma City, Okla.	22	1849	3202	2016	0	7089	104	6.5
Interstate Brands Corp	Kansas City, Mo.	5546	557	738	89	0	6930	133	2
Campbell Taggart, Inc	Dallas, Tex.	4425	617	795	875	0	6712	140	14
Nabisco Brands, USA	East Hanover, N.J.	1550	40	110	4500	0	6200	132	27
Borden Inc., Dairy Div.	Houston, Tex.	2839	847	1460	727	0	5873	132	5
Chemlawn Corp.	Columbus, Oh.	3639	0	0	1305b	0	4944	NA	0
Tyson Foods, Inc	Springdale, Ark.	241	1036	1549	853b	722	4401	63	18
Super Valu Stores	Minneapolis, Minn.	2	989	2399	903	0	4293	89	0
Safeway Stores	Oakland, Calif.	29	951	2579	NA	351	3910	65	0
General Foods Bakery Co	Bay Shore, N.Y.	2562	145	347	509	14	3577	NA	5
McKesson Corp.	San Francisco, Calif.	1500	150	215	1300	0	3165	NA	5
Land O'Lakes, Inc	Minneapolis, Minn.	500	400	700	1004d	500	3104	NA	80
Wakefern Food Corp	Elizabeth, N.J.	0	600	1892	250	0	2742	25	95
Stroehmann Bakeries, Inc	Horsham, Pa.	1478	176	353	189	0	2196	38.3	60
Paul's Trucking Corp.	Woodbridge, N.J.	2	306	1818	12	28	2166	23	18
General Foods Corp	White Plains, N.Y.	0	65	200	1900	0	2165	6e	24
Holly Farms Poultry Ind	Wilkesboro, N.C.	121	448	944	146	277	1936	43.5	0
Giant Food, Inc	Landover, Md.	325	252	1327	19	5	1928	15.4	NA
Vons Grocery Co	El Monte, Calif.	49	472	1137	0	21	1679	31	0
Stop & Shop Companies	Boston, Mass.	0	198	1244	85	0	1527	42.7	NA
Foster Farm Services	Livingston, Ca.	81	280	577	540	0	1478	15	0
Acme Markets	Philadelphia, Pa.	2	275	890	150	0	1317	12	NA
H.E. Butt Grocery Co	Corpus Christi, Tex.	7	176	812	160	20	1175	28	6
Houston Coca-Cola Bottling	Houston, Tex.	508b	188	225	60	160	1141	12	0
The Southland Corp	Dallas, Tex.	6	470	612	0	0	1088	27.8	1
Central Soya Co	Fort Wayne, Ind.	165	78	231	264	172	910	7.7	73
Northrup King Co	Minneapolis, Minn.	450b	1	2	100	350	903	15	15
Drake Bakeries, Inc	Wayne, N.J.	643	17	57	46	0	763	10.5	7
Chas. Freihofer Baking	Albany, N.Y.	459	27	78	58	21	643	10	0
Food Service of America	Kent, Wa.	213	181	236	72	0	630	15	1
United States Sugar	Clewiston, Fla.	494	10	18	79	9	610	NA	NA
Dial Corp.	Phoenix, Ariz.	0	23	84	480	0	587	14.0	100

* – does not include cars. a – 100% of tractors & 20% of trailers. b – includes pick up trucks. c – includes vans. d – includes light trucks. e – trucks only. NA – not available

PRIVATE FLEETS

PUBLIC UTILITIES	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	* % Leased
GTE Service Corp	Irving, Tex.	25,700c	150	725	8410	NA	34,985	380	8
US West	Thornton, Colo.	12,780c	127	50	2830	4541	20,328	150	0
Pacific Gas & Electric	San Francisco, Calif.	9274	76	3917	2682	306	16,255	130	0
Pacific Bell	San Francisco, Calif.	11,518c	30	NA	2167	NA	13,715	114	0
New York Telephone	New York, N.Y.	7,548	1	1	2194	0	9744	89	17
American Elec. Power System	Columbus, Oh.	4180	40	1230	1780	920	8150	73	97
Southern California Edison	Pomona, Calif.	3923	24	1161	1757	812	7677	NA	100
New England Telephone	Boston, Mass.	5900c	0	0	1500	0	7400	74	60
Duke Power Co	Charlotte, N.C.	2988c	75	1238	1159	1126	6586	75	0
Public Service Elec & Gas	Newark, N.J.	2989	9	583	2008	430	6019	30.3	0
LA Dept Water & Power	Los Angeles, Calif.	3230	55	345	1355	1015	6000	53	10
General Public Utilities	Parsippany, N.J.	2706	26	1109	1225	649	5715	45	70
Consumers Power Co	Jackson, Mich.	3002	70	812	534	587	5005	23.0	99
Southern California Gas Co	Los Angeles, Calif.	4067	10	295	508	75	4955	43	100
Niagara Mohawk Power Corp	Syracuse, N.Y.	2617	26	967	659	510	4779	39	89
Commonwealth Edison	Maywood, Ill.	1998	42	706	1527	216	4489	47	.02
Con Edison of NY	Astoria, N.Y.	2603	26	194	1009	469	4301	NA	0
Northeast Utility Service	Kensington, Conn.	1996a,b	11	778	653	286	3724	30	80
ARKLA, Inc	Shreveport, La.	1748	16	864	387	673	3688	32.4	0
Columbia Gas Distribution	Columbus, Oh.	1924	4	216	753	598	3495	33	100
S New England Telephone	New Haven, Conn.	2306c	7	7	1155	NA	3475	33.6	0
N Indiana Public Service	Hammond, Ind.	1630	25	642	269	742	3308	19	2
Pennsylvania Power & Light	Allentown, Pa.	1232	15	636	873	220	2976	22	100
Public Service Co of CO	Denver, Colo.	1558	17	540	402	358	2875	22	6.26
Florida Power & Light	Miami, Fla.	1292	43	797	312	340	2784	NA	2
Long Island Lighting Co.	Hicksville, N.Y.	1359	13	335	652	315	2674	11	14
Philadelphia Electric	Berwyn, Pa.	1442	22	473	705	23	2665	16	100
Detroit Edison	Detroit, Mich.	1250	55	620	231	502	2658	25	93
Central Telephone Co	Chicago, Ill.	1819	0	60	675	20	2574	25.9	0
New York State Elec. & Gas	Binghamton, N.Y.	1388	13	335	492	281	2509	21.7	75.6
Northern States Power Co	Minneapolis, Minn.	950	7	700	750	16	2423	19	30
Illinois Power	Decatur, Ill.	1059	5	488	409	398	2359	13	0
San Diego Gas & Electric	San Diego, Calif.	1300	60	218	539	110	2327	24.6	100
Salt River Project	Phoenix, Ariz.	1140	20	366	296	342	2164	15	0
Northern Illinois Gas	Naperville, Ill.	1021	3	230	556	290	2100	23	0
South Carolina Electric-Gas	Columbia, S.C.	1048	15	320	491	164	2038	NA	0
Jersey Central Power & Light	Morristown, N.J.	1059a,b	9	600	287	50	2005	18	75
Wisconsin Electric Power	Milwaukee, Wisc.	900	13	535	123	343	1914	10.5	0
Cincinnati Gas & Electric	Cincinnati, Oh.	917	2	330	493	155	1897	16.3	0
Oklahoma Gas & Electric	Oklahoma City, Okla.	940	25	322	222d	325	1834d	16	0
Appalachian Power Co.	Roanoke, Va.	1120	7	250	425	25	1827	23.2	100e
Public Service Indiana	Plainfield, In.	900	10	450	300	50	1710	14	85
Memphis Light, Gas & Water	Memphis, Tenn	912	11	220	167	15	1325	2.5	0

* – does not include cars; a – includes vans; b – includes pick-up trucks; c – includes vans and light trucks; d – does not include contract cars; e – all financial leased NA – not available.

PRIVATE FLEETS

STATE GOVERNMENT#	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	*Annual Mileage (millions)
Texas Hwy & Public Trans	Austin	7391	127	113	1289	9236	18,156	215
California DOT	Sacramento	4733	75	295	3069	4186	12,358	NA
Virginia DOT	Richmond	5100	25	75	2983	1500	9683	NA
Pennsylvania DOT	Harrisburg	4736a	63	276e	597	3996	9668	NA
Massachusetts Motor Vehicle Management Bureau	Boston	3350	14	45	3273	2750	9432	NA
South Carolina Hwy/Public Trans	Columbia	3017	60	446	2709	2063	8295	55
New York DOT	Albany	3821a	72	1197	722	1807	7619	41
Florida DOT	Tallahassee	2679	58	394	1614	2802	7547	75
Michigan Management/Budget Dept, Motor Trans Div	Lansing	1471	16	6	5134	11	6638	NA
NJ DOT	Trenton	1487b	6	6	667	4350	6516	31
Illinois DOT	Springfield	3300b	15	300	860	1634	6109	62
Missouri DOT/Hwy Dept	Jefferson City	2607a	16	16	630	2834	6103	NA
Kentucky Trans Cabinet	Frankfort	3761c	26	34	1800	141	5762	65d
Georgia DOT	Atlanta	2847	60	319	466	2000	5692	NA
Arkansas Hwy. Trans. Dept.	Little Rock	1715	69	50	274	3167	5275	38
Indiana Hwy Dept	Indianapolis	1999c	520	115	1226b	1050	4910	40
Alaska DOT	Juneau	2626c	23	116	657	1021	4443	NA
Minnesota DOT	St. Paul	2540c	36	145	376	490	3587	NA
Colorado Dept. Highways	Denver	1946b	36	213	311	929	3435	29
Iowa DOT	Ames	2106	12	12	529	750	3409	22
Oregon DOT/Hwy Div	Salem	952	32	277	1236c	816	3313	NA
Kansas DOT	Topeka	1485c	17	71	234	1147	2954	NA
North Dakota Hwy. Dept.	Bismarck	330	16	16	525	2000	2887	23
Maryland Hwy Admin	Baltimore	1350c	15	16	300	1000	2681	NA
New Mexico Hwy. Dept.	Santa Fe	1423c	59	559e	327	122	2490	24
Arizona DOT	Phoenix	1386	17	211	229	384	2227	20
West Virginia Hwy Dept	Charleston	758	19	154	422	708	2061	NA
South Dakota DOT	Pierre	1050b	9	79	129	535	1802	NA
Connecticut DOT	Wethersfield	1200	12	80	0	420	1712	20
Nebraska Dept. Roads	Lincoln	663	42	44	238	0	1705b	9.3
Maine DOT/Motor Trans Ser	Augusta	750	12	200	421	250	1633	NA
Wisconsin Dept of Admin	Madison	5	0	0	1500	0	1505	25
Montana Hwy Dept	Helena	517	67	140	137	76	1394b	17
New Jersey Turnpike Auth.	Hightstown	385b	3	81	387	450	1306	NA
Alabama Dept. Pub. Safety	Montgomery	20	5	0	1200	0	1225	NA
Idaho DOT	Boise	998a	17	79	105	0	1199	17
Washington Dept. Nat. Resources	Olympia	616	7	160	251	128	1162	9.2
Delaware DOT	Dover	540a	11	12	229	175	967	NA
New Hampshire DOT	Concord	507b	2	8	218	131	866	10
Louisiana DOT	Monroe, La.	219	9	8	21	330	587	NA
Hawaii DOT	Honolulu	112	8	11	290	157	578	3

* – does not include cars. # – may not include all departments. a – includes pickup trucks. b – includes pick-ups and vans. c – includes pick-up trucks, vans and miscellaneous vehicles; d – includes cars. e – includes all trailers, not just semi s. NA – not available

PRIVATE FLEETS

CITY GOVERNMENT#	Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	* % Leased
Los Angeles, Calif.	4235g	40	375	1200	250	6100	3	0
Atlanta, Ga.	969	48	134	786b	2791	5518	NA	NA
Baltimore, Md.	2700fn	15	25	2000b	400	5140	NA	0
Phoenix, Ariz.	2021e,g,h,i	178	305	1572b,c	445a	4521	40.5	0
Fort Worth, Tex.	1111	4	145	1005	1379	3644	18.6	0
Cleveland, Oh.	1326	6	166	1065	790	3347	15.6	0
Dallas, Tex. Equip Services Dept	880	28	140	1644	430	3122c	48.4	.003
Austin, Tex.	1162	71	197	1074	612	3116	12.5	0
San Antonio, Tx.	1230	152	114	962	303	2761	33	0
Baton Rouge, La.	432	20	53	602	1480	2587	NA	0
Virginia Beach, Va.	806	10	90	641	913	2460	22	0
Miami, Fla.	650	2	50	1100	250	2052	NA	1
Sacramento, Calif.	348	5	165	937	256	1711	13	0
Salt Lake City, Ut.	626o	6	33	646	387p	1698	NA	0
San Jose, Calif.	626c	31	66	644b	306a	1673b	13.4	0
San Diego, Calif.	1206	41	64	94	214	1619j,l	14.5	0
Long Beach, Calif.	601	5	79	666	252	1603	NA	0
Charlotte, N.C.	392	4	4	952	131	1483	15.5	0
Lexington, Ky.	453	59	44	541	372	1469	9	0
Norfolk, Va.	587	2	26	460	387	1462	9.2	0
Clearwater, Fla.	341	11	67	200	498	1417a	4	0
Akron, Oh.	800c	4	15	435b	150	1404	NA	0
Anaheim, Calif.	348	1	90	378	572	1389	5	2
Louisville, Ky.	360g,i	75	25	732	188	1380	9.2	0
Tallahassee, Fla.	648	8	114	297	253	1320	14	0
Greensboro, N.C.	472g,i	2	120	395	196	1185	10.5	0
Raleigh, N.C.	510	1	85	362	170	1128	10.6	.1
Winston-Salem, N.C.	376	3	28	555	147	1109	7.7	0
Orlando, Fla.	472	67r	140s	395	28	1102	NA	0
Corpus Christi, Tex.	265	118	69	339	137	928	NA	0
Knoxville, Tenn.	342e,i,g	6	29	389b	145	911	14	0
Rochester, N.Y.	356	1	18	420b	93	888	7	0
Shreveport, La.	305	12	62	335	123	837	NA	0
Savannah, Ga.	386	1	5	357	55	804	12.4	0
Pontiac, Mich.	175	1	28	102j,l	488a	794,c,d	NA	.007
Roanoke, Va.	329	6	30	215	201	781	NA	1
El Paso, Tex.	532	14	34	83	109	772j,k,i,t	NA	0
Montgomery, Ala.	340e,g,h	2	2	346b	73	763a,c	NA	0
Ft. Lauderdale, Fla.	189	21	39	324b	44	617c,e	NA	0
Midland, Tx.	97	2	4	226	86	415	3.3	0

* – does not include cars. # – may not include all departments. a – includes miscellaneous vehicles. b – includes police fleet. c – includes pickups, vans, jeeps, motorcycles, etc.; d – does not include education or fire dept. e – includes fire trucks. f – includes 340 light trucks. g – includes vans. h – includes dump trucks. i – includes pick-up trucks. j – does not include fire dept; k – does not include school bus fleet. l – does not include police dept. n – includes 300 school buses. o – includes fire, refuse, sweepers, vans. p – includes motorcycles/ATV's; r – includes 60 farm tractors; s – includes 130 misc. small trailers. t – does not include metro, airport and water depts.; NA – not available.

PRIVATE FLEETS

PETROLEUM	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	* % Leased
Conoco Inc	Houston, Tex.	1400b	435	820	345	NA0	3000	NA	27
Dowell Schlumberger	Tulsa, Okla.	780	725	1044	2000	NA	4549	5.0	NA
Petrolane, Inc	Long Beach, Calif.	1564d	140	273	248	NA	3302	NA	39
Arco Oil & Gas	Dallas, Tex.	848	0	500	646	762	2756	24.9	0
Agway Petroleum Corporation	Syracuse, N.Y.	320	26	28	0	0	1225	12	0
Texaco Refining & Mkt, Inc	Houston, Tex.	69	146	186	742	NA	1143	35.5	98
Weltech, Inc	Houston, Tex.	475	46	50	25	470	1066	20.2	37
Total Petroleum Inc.	Denver, Co.	377a	207	231	201	170	1186	30	97
Liquid Carbonic Corporation	Chicago, Ill.	154	250	630	200	0	1234	27	30
Mobil Oil Corp (c)	Fairfax, Va.	50	310	410	0	160	930	22.0	5
Big Three Industries, Inc	Houston, Tex.	159	91	201	37		488	NA	1.5
Transco Energy Co	Houston, Tex.	450b	5	100	230	50	835	11.5	0
Meenan Oil Co	Wantagh, N.Y.	490	40	35	94	6	665	NA	0

* – does not include cars, a – includes pick-up trucks, b – includes light trucks and vans, c – marketing dept only, d – does not include light duty pick-up trucks, NA – not available

FEDERAL GOVERNMENT*	Trucks & Tractors	Cars & Station Wagons	Ambulances	Buses	Total Vehicles
US Postal Service	134,338	9531	0	14	143,883
General Services Administration (a)	44,407	53,432	234	2840	100,858
Air Force	46,300	5908	1645	2440	56,293
Army	34,147	9407	1108	2770	47,432
Agriculture Department	27,169	3937	1	43	31,150
Navy	25,029	3213	684	972	29,898
Justice Department	4308	12,706	10	137	17,161
Interior Department	12,574	1666	11	109	14,360
Department of Energy	9240	1913	54	263	11,470
Treasury Department	1419	7943	0	13	9375
Marine Corps	5999	700	0	326	7025
Civil Works, Corps of Engineers	5894	838	1	19	6752
Tennessee Valley Authority	2281	1495	11	0	3787
State Department	1825	1122	11	0	2958
Labor Department	1205	328	12	34	1579
National Aeronautics & Space Admin	987	157	13	11	1168

a – most vehicles are in Interagency Motor Pool and rented or leased to other government fleets. There is no duplication with other fleets listed. * – Source: General Services Administration Report, printed 1989